



OunceNet for Doulas User Manual



The Ounce of Prevention Fund
Illinois Birth to Three Institute
OunceNet Help Line: 1-800-789-4815

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Introduction

OunceNet is the outcome tracking system for Ounce funded Doula programs in Illinois. Doula programs are contracted to serve a predetermined number of participants by providing specialized services that are designed to improve health and development for both child and parent.

OunceNet is a tool for programs to track the number of participants enrolled and the services these participants receive. The system assists in comparing program expectations to actual program performance. This provides valuable information to program directors and managers, as well as to Ounce of Prevention Fund staff.

In addition to tracking services, OunceNet tracks a number of outcome indicators that each program strives to impact. Some of these indicators reflect participant activities such as breastfeeding, while others outline details of the births or other child information.

While service and outcome tracking are the primary purposes of OunceNet, the system can help serve other purposes as well. There are tools in OunceNet that can help with program management and development. In addition, reports help Doulas and supervisors stay updated on their program's current status. Finally, the contractual obligation pages and accompanying reports can help serve important accountability functions.

How to Use OunceNet

Getting to OunceNet

OunceNet is a Web-based computer application, which means if your computer is not connected to the Internet you cannot use OunceNet. To access OunceNet, you need to use Internet Explorer as your Web browser. OunceNet does not work properly on Google Chrome or other Web browsers. If you cannot access OunceNet using Internet Explorer you should alert your MIS Contact.

OunceNet Address

- To get to OunceNet once you are in Internet Explorer, go to www.opfibt.org (type this Web address into the Internet Explorer address bar).
- Click **PTS OunceNet**, then select the **Enter OunceNet** link.
- Your computer will then open the OunceNet *Sign In* screen.

OunceNet as a Favorite

- To add OunceNet as a Favorite, go to the OunceNet address and then select **Add to Favorites** from the **Favorites Menu**.

Make OunceNet Your Home Page

- If you would like OunceNet to be the first site to come up when you open Internet Explorer you can make it your Home Page.
- While in Internet Explorer go to the **Tools** Menu. Select **Internet Options** at the bottom.
- If you are already on the OunceNet page, select **Use Current** in the **Home Page** area. If you are not on the OunceNet site, you will need to type the OunceNet address in to the **Home Page** area. Click **OK** at the bottom.

Make OunceNet a Shortcut on Your Desktop

- If you would like to open OunceNet directly from your desktop you can create a shortcut to the OunceNet site.
- While at the OunceNet site go to the **File Menu** and select **Send**. Select **Shortcut to Desktop**.
- Now to open OunceNet you can simply **double click** on the shortcut on your desktop.

Signing In and Out

Signing Into OunceNet

- OunceNet is a protected system, so to use it you must tell the system who you are by using your **Sign-In Name** and **Password**.
- Enter your **Sign-In Name** and **Password** in the appropriate text boxes and then click the **Enter** button.
- If you do not know or remember your Sign-In Name or Password talk to your MIS Contact.

Signing Out of OunceNet

- When you are signed in you are using OunceNet resources. The fewer signed in users, the more quickly the system operates. Because of this it is much better for everyone using OunceNet if you sign out of the system when you are done using it.
- Click the **Quit** button, which always appears in the upper right hand corner of the screen.
- Be careful, the **Quit** button will not save your work! Follow all the instructions in the Saving Data section to ensure you do not lose work when you sign out.
- When you sign out, OunceNet will take you to a confirmation screen from which you can sign back in. You can leave this screen, which connects you to the Internet, on your computer for as long as you want or you can close the program and exit the Internet all together.

Timing Out of OunceNet

- If you stay signed in for too long without activity OunceNet will sign you out to conserve resources. This is a system time out. It only happens if you do not click any links or buttons for 15 minutes straight. Any unsaved data will be lost, so be sure to save your data often.
- You will not see any change on the screen, but you will need to sign in to OunceNet again before continuing.
- To avoid timing out remember to save your work often, including while you are working, when you sign off, and when you leave your computer to do something else.

Getting Around OunceNet

Point and Click Once

- As with most Web-based programs, you get around OunceNet by pointing and clicking. But unlike some programs, in OunceNet you always only click one time, never twice.
- There are two types of things you will be clicking most of the time: Links and Buttons.

Links and Buttons

- Links are always underlined words; in OunceNet they are usually a shade of blue.
- Buttons appear as words on top of or next to pictures or boxes. Most often the picture is literally a grey button. To click on the button you can click either the word or the picture.

Link and Button Behavior

- Most links and buttons are navigational, meaning that they take you from one OunceNet page to another. For example, clicking the **Participants** button on the *Home* screen will take you to the *Participant* screen.
- Sometimes before clicking a navigational link or button, you have to tell OunceNet something first about where you want to go. For example, before you click on the **Select** button on the *Participant* screen, you first have to select the participant's name that you want.
- Other links and buttons are not navigational, and only affect the screen you are on. For example, clicking on the **Add New Record** link on the *Enrollment* screen will create another record on the same screen.

Color Coding in OunceNet

- There are four main sections to OunceNet, each identified by a color (**Participant**, **Service**, **Agency**, **Reports**). The color of the page outline tells you which section you are in.
- You can always use the color of the page you are on as a general reference to see where you are in the system.

The OunceNet Logo

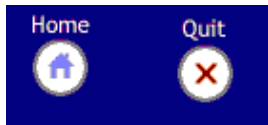
- Every screen in OunceNet has the OunceNet logo in the upper left corner of the screen. When you see this logo you know you are using OunceNet.



Getting Around OunceNet, cont.

The Home and Quit Buttons

- Across from the OunceNet logo in the other upper right corner of every screen there are two buttons, **Home** and **Quit**.
- The **Home** button will always bring you to the *Home* screen. The **Quit** button will always sign you out.



The Navigation Bar

- Directly below the **Home** and **Quit** buttons is something called the **Navigation Bar**. The **Navigation Bar** is a running list of links showing all the screens you have been to since the *Home* screen.
- The last screen listed is usually the name of the screen you are viewing. The **Navigation Bar** shows you where you have been and where you are now.
- You can always go back to any of the screens you were on previously by clicking on the screen's name in the **Navigation Bar**.
- Be careful, the Navigation Bar will not save your work! Follow all the instructions in the Saving Data section (p. 12) to ensure you do not lose work before using the **Navigation Bar**.



Navigating Between Sections in OunceNet

- If you want to stop working in one section of OunceNet and move to another or even if you are not sure where to go, click the **Home** button or the **Home** link in the **Navigation Bar**.
- From the *Home* screen you can enter any of the four sections of OunceNet.

Entering Data

Different Ways to Enter Data

There are five different ways to work with data in OunceNet: Text Box, Dropdown List, Radio Button, Single Pick List Box, and Multi Pick List Box.


Text Box

- A text box is a simple box in which you type information such as dates and names.
- To enter data into a text box click on it once and your cursor will appear in the box. When you begin typing, the words will then appear where you see your cursor.

Date

Duration Minutes


Dropdown List

- Dropdown lists look a little like text boxes but limit what you can enter. You must make a choice from a set list of acceptable answers. To use a dropdown list, click once on the little triangle on the right side  and then click on the choice you would like to make.
- If the list is long you may have to scroll through it to find your choice. If it is very long try typing the first letter of your choice to find it more quickly. For example if you're looking for Kankakee County in a long list of counties, click on the County dropdown list and type K.

Status

Level

Radio Buttons

- Radio buttons are often used in Yes/No questions or questions where there are only a few possible responses.
- To use a radio button click the little circle  next to the word(s). Once you make a choice the little circle will have a black dot in it. The only way to undo a choice is to make another choice.

☐ Yes ☐ No

☐ Yes ☐ No

Entering Data, cont.

Single Pick List Boxes

- List boxes are similar to drop-downs, but the choices are always shown. To use a single pick list box use your mouse or scroll bars to find the choice you wish to select, then click on that choice once.

Incomplete Intakes

Bruce, Matthew PID: 9099
Smith, Sam PID: 9100

Multi-Pick List Boxes

- Multi Pick List Boxes are list boxes that allow you to make multiple selections.
- To select one choice, just click on it. To select more than one, hold down the Control (Ctrl) key as you click each choice. There are two Control keys, each on a lower corner of the keyboard.
- To deselect, hold down the Control key and click the choice.

County

A-K Counties

Adams
Alexander
Bond
Boone
Brown
Bureau

Data Grids

- A Data Grid is like a mini table on the screen. It allows you to see many records at once and choose the one to work with.

Add New Record

Start Date		
12/10/2002	Edit	Delete
1/15/2003	Edit	Delete
2/15/2004	Edit	Delete

Entering Data, cont.

Adding Records in a Data Grid

- To add a new row to a data grid click **Add New Record**, which is always above the data grid and usually on the left. This will give you a new row in Edit Mode on the bottom of the grid.
- You can now enter data in that row. OunceNet will not save the row until you click the Update link. If you click **Cancel** link or any other link (like the **Navigation Bar**) OunceNet will NOT save your entry.

Editing or Deleting Data in a Data Grid

- To edit a row, click the **Edit** link in the row you wish to edit. This will put that row in Edit Mode. Notice that the Edit link has changed into two links: **Update** and **Cancel**.
- You can now change or enter data in that row and only that row.
- To save any changes to a row, you must click the **Update** link.
- To delete a row, click the **Delete** link of the row.
- Because the **Edit** and **Delete** buttons permanently remove data from the system without leaving any record, you generally only use them to correct prior erroneous entries, not to add to or update prior records. Use **Add New Record**, NOT **Edit** or **Delete**, to update data grids with new records.

Add New Record

Start Date		
12/10/2002	Update	Cancel Delete
1/15/2003	Edit	Delete
2/15/2004	Edit	Delete

The Details Link

- Often data grids are not for entering or editing data, but rather a way to choose a record to work with. The data grid then serves as a link to another screen where you can enter data.
- Data grids like this have a **Details** link. To go to the screen that has the rest of the data for a row, click that row's **Details** link.

Edit	Delete	Details
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Saving Data

Just because you enter it doesn't mean it's saved!

- Saving data in OunceNet happens by clicking one of three things, depending on which part of the system you are using: **Update**, **Next Step**, **Submit** or **Save**.

Saving in a Data Grid

- Click the **Update** link.
- While in Edit Mode, if you click any link other than **Update** (such as the **Navigation Bar**) OunceNet will NOT save your changes to that row.

Saving in a Step Process

- Click the **Next Step** button.
- In the Participant Intake process, OunceNet only saves data when you go to the next step. So if you enter data on Step 4 and then go to the *Home* screen, your work from Step 3 will be fine, but anything you just entered on Step 4 will be gone.

Saving On All Other Screens

- All other screens have a **Save** or **Submit** button in the upper right corner of the page below the **Navigation Bar**.
- You must click the button before you leave the screen to save your work.
- Sometimes, such as in the *Service Ledger*, clicking the button will automatically take you back to the previous screen. However, clicking **Save** or **Submit** usually produces no visible result.

Things to Remember and Avoid

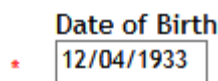
- Do not click the **Home** or **Quit** button or any link in the **Navigation Bar** without saving your work.
- Do not close Internet Explorer without saving your work.
- Remember if there is no activity on an OunceNet screen for 15 straight minutes, OunceNet will sign you out. When OunceNet signs you out, all unsaved work on the page is lost.
- Whenever you try to save anything, OunceNet will check your work. If you have made errors OunceNet will not let you complete and save your work. You must fix all the errors and save it again. See the next section for more information about this.

Checking Your Work

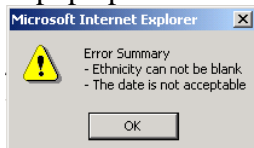
Checking Your Work

- OunceNet will NOT save data that contains errors the system can detect. Instead, it will give you error messages in one or more of these three ways:

1. A little red asterisk (*) next to each error



2. A pop up box describing the error or errors



3. Text in red near the top of the page that describes each error in much more detail

Please correct the following error(s):

- Update is not successful, because:
data type numeric. The statement has:

- Asterisks and pop up boxes appear together. Red Text on the page appears independently and is much less common.
- Remember if you get errors, it means that OunceNet has not saved your work. **You must fix the error and then save again.**
- If you get an error message that you don't understand or cannot fix, talk to your MIS Contact first. If the two of you cannot resolve the error together, call the OunceNet Team.

What Errors Does OunceNet Look For?

Missing Required Fields

- Most fields in OunceNet are required fields. If you try to save a record without entering a required field, you will get an error message.

Bad Dates and Times

- Dates should follow the format mm/dd/yyyy, so October 15, 2014 becomes 10/15/2014. You can also write 2014 as 14. Dates must also be within an acceptable range- not in the future or too far in the past.
- Times should follow the format 00:00 AM/PM, so 3 PM would become 3:00 PM. You must always indicate AM or PM. If a date or time is in the wrong format or out of range, OunceNet will tell you "The date/time is not acceptable."

Bad Numbers

- Number fields should only have numbers entered. If you enter the letter Y in the **Duration in Minutes** field, this will be an error. Some number fields only accept a range of numbers. If you enter an FTE of 105% for a staff person, you will have an error.

Look For Your Own Errors

- The best way to deal with errors is to check your own work before you try and save it. In the end, this will save you time.

OunceNet Sections

Participants

- Intake
 - Intake Process
- Update
 - Participant Information
 - Components, Status, Assignments
 - Outcome Indicators
 - Intake Updates
 - Prenatal and Child

Service Ledger

- Individual Contact
- Doula Services
- Group Services
- Community Education
- Referrals
- Meetings
- Supervision

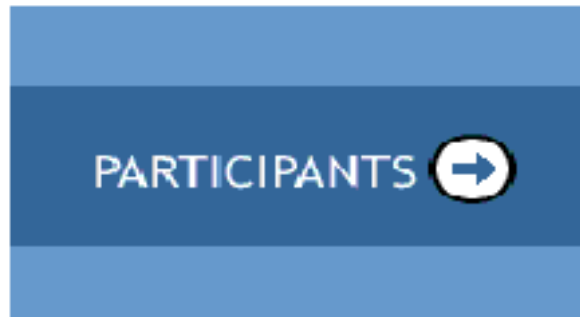
Agency

- Staff
- Groups
- Referral Library

Reports

- Listing Reports
- Administrative Reports

Participants



Introduction to Participants

The **Participants** section is where you will enter, and OunceNet will store, all data on individual participants. All data entered in the **Participant** section is either Intake or Update Data. Intake Data is gathered and entered during the Participant Intake Process, while Update Data is anything entered after that process is complete.

Intake Data

You will enter all participants into OunceNet using the Participant Intake Process. The process is a series of steps designed to ensure the collection of the necessary baseline data for each participant. However, since participants take part in different types of services, the necessary data may be different from intake to intake. In other words, OunceNet does not necessarily need the same data for every participant entered. Because of this, the OunceNet intake process is dynamic. This means that the process may skip some steps for one type of participant, but then require those steps for another. OunceNet will know what kind of intake to perform based on the information you enter.

The most important determinant for what type of intake you will perform is the choice you make in Step 1 for the field **Intake Type**. There are three options for this choice: **Full Intake**, **Doula Only**, and **Group Roster Only**. Programs the Ounce funds to provide long-term home visiting services are the only programs that use **Full Intake**. When entering participants that are only receiving Doula services, you will complete one of two types of intake:

- **Doula Only Intake:** This intake is for participants who are enrolling with only a Doula and not an FSW.
- **Group Roster Only Intake:** This intake is for participants who are only participating in Prenatal Groups. They skip almost all of the steps since very little data is collected about them. They must, however, be assigned to a group, and they must have some contact data entered in the final step.

Once you have completed the Participant Intake Process, there is very little additional Intake Data to enter. Generally, Intake Data is any information that you most likely will only enter once. It includes things like ethnicity, birth dates, and addresses, things that change infrequently, if at all, or data that is not required to be updated, such as education or employment status.

Intake and Updates for Child Data

There is no step-by-step intake process for Child Intake Data since virtually all of the data fits on the *Child Intake* screen. As you will see, the *Child Intake* screen is accessed from the *Child Data* screen. Once you enter the child intake data, the *Child Data* screen will probably be all that you need for that child's information. It lets you access all of the child areas you will want to update.

Update Data

Most of the data you will enter on a participant after intake will be done on Update screens. Due to the nature of the Doula program (i.e., only being a five month service), very little data is expected to be updated on the same schedule as is expected for participants enrolled in Ounce funded long-term home visiting programs. However, some of the data you will need to collect from Doula only participants at intake will be entered into OunceNet on an update screen, as this is information that is regularly updated for participants enrolled in long-term home visiting.

You will access almost all of the Update Data for a participant from the *Participant Outcome Indicators* screen. Whether you intend to update Education, WIC Status, or Referral Outcomes, the screen you want to visit is the *Participant Outcome Indicators* screen. This screen is accessed from the *Participant Information* screen, the first screen you see when you select a participant. This first screen is an Update screen in its own right. From here you can access and update Enrollment Status, Service Intensity, Staff, or Group data.

For Doula only participants, you will enter some of the data collected at intake on the *Participant Outcome Indicators* screen. This is because the Ounce expects staff members serving participants enrolled in long-term home visiting to update this information every six months. The intake data that you will access from the *Participant Outcome Indicators* screen includes employment, education, contraception, homelessness, and WIC.

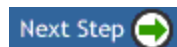
Using the Participant Intake Process

In OunceNet, the Participant Intake Process is used to enter all new participants. The process is referred to as a “step” process, which means you complete a series of steps one at a time, saving each step as you go.

The OunceNet screens that make up the Participant Intake Process are used together in one unified process. Because it is a process, the intake steps must be completed in order. OunceNet will guide the user through different steps depending on the type of program and the type of participant. OunceNet will automatically skip any steps you don’t need for a particular participant. Anything you enter during intake can be edited after the process is complete, either from the last step or from the *Intake Data* screen.

The Next Step Button

- Use the **Next Step** button located just below the main **Navigation Bar** to move through the process. It will:
 1. Check your work for errors.
 2. Save your work.
 3. Bring you to the next step you need to complete.



Saving Your Work

- Click the **Next Step** button to move from one step to another. All the data you entered on that step will then be checked and saved.
- Until you click the **Next Step** button, the data on that step will not be saved.

The Intake Step Bar

- Below the **Next Step** button there is an Intake Step Bar showing all the steps of the intake process.
- Completed Steps are blue. Skipped or Incomplete Steps are grey.
- On most screens you can only use the Intake Step Bar to view progress and not to view previous screens. However, on the last screen of the intake, you can use the bar to go back, review and edit any of the completed steps.

Step1 > Step2 > Step3 > Step4 > Step5 > Step6 > Step7 >

Saving an Incomplete Intake

- If you want to stop entering intake data before the intake process is complete you can use the **Navigation Bar** to return to either the *Home* or *Participant* screens.
- OunceNet will save all your completed steps, but it will not save data entered on the step from which you exited.
- See the following page for instructions on how to resume an intake that has been saved in this way.

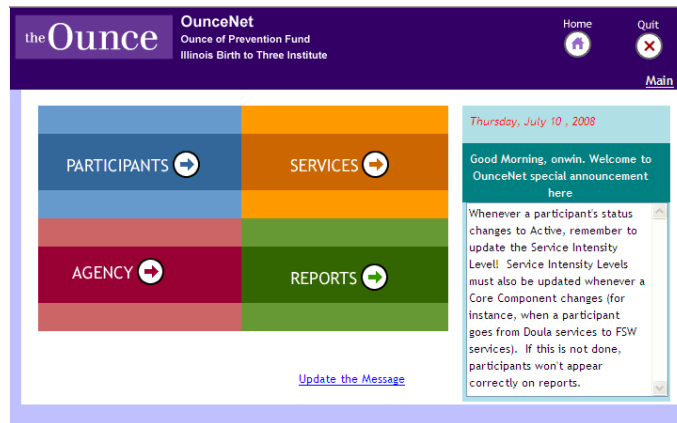
Using the Participant Intake Process, cont.

Completing an Intake

- Most intakes are complete when you enter the required data on Step 7 and click the **Next Step** button.
- This will lead to the *Intake Complete* screen, from which you can:
 - Review or edit any of the completed steps.
 - Continue to enter data concerning the same participant.
 - Return to the *Home* screen.
 - Sign out of OunceNet.

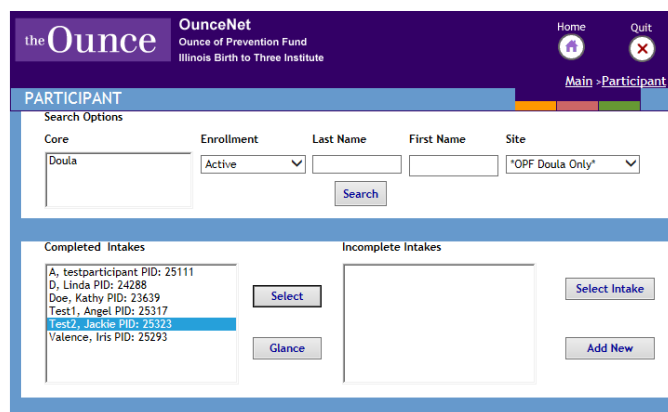
Getting to Participant

From the *Home* screen, click the **Participant** button. This brings you to the main *Participant* screen.



Starting a Participant Intake

- On the *Participant* screen click the **Add New** button in the lower right corner.
- Click this button only when you want to add a completely new participant to OunceNet. If this person is already in the system in any other way, do not begin a new intake.
- An intake does not have to be completed all in one sitting. However, no other data can be entered concerning a participant until the intake is complete.



Resuming a Participant Intake

- If you have already started an intake and you want to get back to it, look for the name of the person in the **Incomplete Intakes** list box on the lower right side of the screen.
- If you do not see the name you can scroll through the list to find it. The search options at the top of the screen do not affect the names in the **Incomplete Intake** box in any way.
- Once you find the name you want, select that name by clicking on it once. Then click on the **Select Intake** button to the right of the box. This will take you to the last completed step of that intake.

Participant Intake Step 1: Basic Information

This step is very important. Your choices here determine which intake steps OunceNet will include.

The screenshot shows the OunceNet web application interface. At the top, the header includes 'the Ounce' logo, 'OunceNet Ounce of Prevention Fund Illinois Birth to Three Institute', and navigation links for 'Home' and 'Quit'. Below the header, a breadcrumb trail reads 'Main > Participant >'. The main content area is titled 'PARTICIPANT Participant Intake -- Step 1: Basic Information'. A progress bar at the top of the form indicates 'Step 1' is the current step, followed by Step 2 through Step 7. The form contains several input fields: 'First Name' with the value 'Whitney', 'Last Name' with the value 'Fake.2014.11.10', 'Signed Consent Form On File?' with radio buttons for 'Yes' (selected) and 'No', 'Program Name' with a dropdown menu showing '*OPF Doula Only Program*', 'Intake Type' with a dropdown menu showing 'Doula Only', and 'Start Date' with the value '10/1/2014'. A red note on the right side of the form states: 'Note :You must choose 'Yes' if you wish to continue.'

Names and Signed Consent Form

- You must enter both first and last names and click **Yes** to the Consent Form question before OunceNet will proceed with the intake.
- You must have a signed Ounce of Prevention fund consent form completed for a participant before entering any of that participant's information in OunceNet.

Program Name

- This is the name of your Ounce funded program.

Intake Type

- This choice and the program type determine which steps OunceNet will skip as you proceed. There are currently three types of intake:
 1. **Doula Only Intake**: Will always skip Step 2.
 2. **Group Roster Only Intake**: Will always skip steps 2, 4, 5, and 6.
 3. **Full Intake**: This intake is only used for participants enrolled in Ounce funded long-term home visiting services.
- It is very important that you make the right choice here, as it will affect the rest of the intake.

Participant Intake Step 3: Enrollment

The screenshot shows the OunceNet web application interface for Participant Intake Step 3: Enrollment. The header includes the Ounce logo, OunceNet name, and navigation links (Home, Quit). The breadcrumb trail is Main > Participant > Participant Intake -- Step 3: Enrollment. A progress bar shows Step 1, Step 2, Step 3 (active), Step 4, Step 5, Step 6, and Step 7. The form fields are as follows:

- Participant Name: Whitney (text input), Fake:2014.11.1 (text input)
- Program Enrollment:
 - Start Date: 10/1/2014 (date input)
 - Status: Creative Outreach (dropdown menu)
 - Core Component(s): Doula (dropdown menu)
 - Other Component(s): (empty text input)
- Group At Intake: Mom's Social (test) (dropdown menu)
- Income Eligible: Yes (dropdown menu)
- What kind of medical insurance does the participant have: Medicaid (dropdown menu)
- Participant in RCT: (empty dropdown menu)

To Enroll a Participant:

- Enter the enrollment **Start Date**.
- The **Status** drop-down list will always appear as **Creative Outreach** for new participants. **Active** status does not occur until after the first two completed pre-natal Doula Home Visits or a Doula Attended Birth.
- Select the **Core Component**. The correct core component for participants receiving only Doula services is Doula. For agencies funded by the Ounce for only Doula services, OunceNet should default to Doula as the Core Component.
- Select **Income Eligible** Status options are Yes, No, and Unknown.
- Select **Medical Insurance** Status options are Medicaid, Other Insurance, and No Insurance

Group Roster Assignment

- Step 3 also allows for assigning a participant to a group.
- If you are unsure whether the participant will attend a group, simply leave the **Group at Intake** choice blank. You may then add the participant to the group roster later if and when she attends.
- To add a participant to a group (or additional groups) after the Intake process, use the **Groups Assigned** link on the *Participant Information* screen.

Participant Intake Step 4: Service Intensity

The screenshot shows the OunceNet web application interface. At the top, the header includes the 'the Ounce' logo, 'OunceNet', 'Ounce of Prevention Fund', and 'Illinois Birth to Three Institute'. Navigation links for 'Home' and 'Quit' are present. A breadcrumb trail shows 'Main > Participant >'. Below this, a progress bar indicates the current step is 'Step 4: Service Intensity Level'. The main content area contains a form with two fields: 'Participant Name' with a text input containing 'Test' and a 'Name' label, and 'Service Intensity Level' with a dropdown menu currently set to 'Level X'. A 'Next Step' button with a green arrow is located at the bottom right of the form area. A step navigation bar at the top of the form area shows 'Step1 > Step2 > Step3 > Step4 > Step5 > Step6 > Step7'.

- Because all Doula participants begin as Level X, there is nothing you need to click for this step. Simply click **Next Step** to proceed to Step 5.
- Participants remain on Level X while they are on Creative Outreach status. When they become Active, they are then assigned a new Service Intensity Level based on the frequency of the visits they are receiving. Participants enrolled in Doula services are assigned to the Doula Home Visiting Model Service Intensity Level.
- Group Roster Only intakes automatically skip this screen.

Participant Intake Step 5: Staff Assigned

You may skip this step if you do not yet know the staff assignment for the participant. To skip this step, click the **Next Step** button. If you do skip this step, please remember to go back and assign a one staff person later using the **Staff Assigned** link on the *Participant Information* screen.

The screenshot shows the OunceNet interface for Participant Intake Step 5: Staff Assigned At Intake. The header includes the Ounce logo and navigation links (Home, Quit). The breadcrumb trail is: Main > Participant > Participant Intake -- Step 5: Staff Assigned At Intake. A progress bar shows Step 1 through Step 7, with Step 5 highlighted. The main content area displays the Participant Name: Whitney Fake.2014.11.10 and an Add New Record link. Below this is a table with columns: Start Date, End Date, Staff Name, and Service Provided. The table contains one row with the following data: Start Date: 10/1/2014, End Date: (blank), Staff Name: Doula, Ms.; StaffID: 2324, and Service Provided: Doula Caseload. At the bottom of the table are links for Update, Cancel, and Delete.

Start Date	End Date	Staff Name	Service Provided
10/1/2014		Doula, Ms.; StaffID: 2324	Doula Caseload

Assigning Staff

- If you do want to assign staff at intake click the **Add New Record** link.
- Because the staff assignments here apply at intake, the Start Date will always be the date of enrollment. The **End Date** should be left blank.
- Select the **Staff Name** and the **Service Provided** from the drop-down lists. You should assign Doula Only participants to Doula Caseload. Click the **Update** link in order to save the data you just entered. Clicking any other link at this point would mean the record you just created is not saved.
- To add more staff click the **Add New Record** link again and repeat the process.

Participant Intake Step 6: Demographics

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Home Quit

Main >Participant >

PARTICIPANT

Participant Intake -- Step 6: Demographics

Next Step

Step 1 > Step 2 > Step 3 > Step 4 > Step 5 > Step 6 > Step 7

Participant Name: Beth Armstrong

Nick Name: Date of Birth: 1/1/1980 Gender: Female Ethnicity: Native American Marital Status: Never Married

Referred From: Friend Language: English Intake Performed By: Voisin, Irene; StaffID: 1515 Teen Parent Ward of State at Intake: Yes

Mother Of Participant A Teen Mother: No Mother Of Participant A HS Graduate: Yes Sibling Of Participant A Teen Mother: No Participant Receives TANF: Yes

Current Living Situation: Two Parent Family, One Parent Family, Foster, Step Home

- Group Roster Only intakes automatically skip this step. Other Intakes must complete all the fields on this step except **Nick Name**.
- Enter a **Date of Birth**. The system is designed to only accept participants who are at least 10 years old. Select **Gender**, **Ethnicity**, **Marital Status**, and whether the participant was a **Ward of State at Intake** (This field is only relevant for teen participants. For non-teen participants, please select **Unknown**). If you do not know the correct choice you may select **Unknown** where that is an option. You may specify data later by updating the *Intake Data* screen, accessed through the *Participant Information* screen.
- Select where the participant was **Referred From** and the participant's **Language**. If you do not know, select **Other**, then return to the *Intake Data* screen later to make corrections.
- Select who performed the intake.
- If the participant is a teen, select whether the participant's mother (the teen parent's mother) was a **High School Graduate** and/or a **Teen Mother** and whether the participant's sibling was a **Teen Mother**. For non-teen participants, select **Unknown** for these fields.
- Select whether the participant **Receives TANF** (TANF is Temporary Assistance to Needy Families).
- If you select **Unknown** for any of the above fields because you do not have the correct information at the time you are entering the data, please collect the information from the participant and update the field in OunceNet as soon as possible. For some of these questions you may feel that making one choice is not accurate. A participant may speak both English and Spanish equally well, or perhaps two staff people performed the intake; however, with the exception of **Current Living Situation**, OunceNet will only allow a single choice for all required fields. Use your best judgment and select the choice that you feel best reflects the intake. In some situations, it may be best to ask the participant how she views herself or her situation. You can always go back and make corrections on the *Intake Data* screen.
- The **Current Living Situation** is the last field on the screen. Select all choices that apply to the best of your knowledge. If more than one of the living situations listed applies to the participant, hold down the Control (Ctrl) key on your keyboard and click any additional options that apply. When the screen is complete, click the **Next Step** button to proceed to Step 7.

Participant Intake Step 7: Contact Information

On Step 7, you must complete at least the three required fields for all participants. These fields are whether or not the participant has a **Permanent Address**, the participant's **City**, and the participant's **County**.

The screenshot shows the OunceNet web application interface for Participant Intake Step 7: Contact Information. The header includes the Ounce logo and navigation links. The form contains the following fields and sections:

- Participant Name:** Beth Armstrong
- Does the participant have a permanent address?** Yes (selected), No
- Participant Address:** 10 West Main St., Apt# [blank], City: Chicago, State: IL, Zip Code: 60603, County: Cook
- Community Area (If Chicago):** West Pullman
- Phone:** 333-4353
- Guardian:** First Name: Marcia, Last Name: Crest, Same Address As Participant: Yes
- Emergency Contact:** First Name: Marci, Last Name: Crest, Relationship To Participant: Mother, Address: 10 West Main St., Apt#: [blank], City: Chicago, State: IL, Zip Code: 60603, Phone: 333-4353

For all participants you must answer the question about the participant's permanent address.

If you answered **Yes** to the question about the participant's permanent address, you must enter:

- **Address**
- **City**
- **Zip Code**
- **County**
- **Community Area** (if **City** is Chicago)

If you answered **No** to the question about the participant's permanent address, you must enter:

- **County**
- **City**
- **Community Area** (if **City** is Chicago)

- For all the other fields on this screen, your program supervisor will make the determination about which data points they expect you to enter for your program.
- If your program does not require you to enter a field on this page and that field is not required by Ounce, you may leave it blank. Check with your supervisor or MIS Contact if you are unsure of your program requirements.

Participant Intake: Completing an Intake

Once you reach the *Intake Complete* screen, the intake is complete!

The screenshot shows the OunceNet web application interface. At the top, the header includes the 'the Ounce' logo, 'OunceNet', 'Ounce of Prevention Fund', and 'Illinois Birth to Three Institute'. There are links for 'Home' and 'Quit', and a 'Main -Participant >' breadcrumb. Below the header, a blue bar indicates 'PARTICIPANT' and 'Participant Intake -- Complete'. A progress bar shows steps 1 through 7, with step 7 being the active and completed step. The main content area displays a congratulatory message: 'Congratulations ! You Have Finished The Intake Process For:'. Below this, there are two input fields containing the text 'Beth' and 'Armstrong'. A question 'What Would You Like To Do Now ?' is followed by three links: 'Return to the Home Screen', 'Enter More Data for this Participant', and 'Save My Work and Quit'.

- If you leave the intake process before reaching this screen, then your intake will be saved as an Incomplete Intake, which you can return to and finish later from the main *Participant* screen. OunceNet will save the intake from the last screen at which you clicked **Next Step**.
- Unlike any of the prior intake screens, this last screen will allow you to return to and edit any of the steps you have just completed. To do this, click any link on the **Intake Step Bar** to return to that step.
- If you return to a prior step to make any changes, be sure to click **Next Step** to save those changes. Then continue clicking **Next Step** until you arrive at this last screen again. If this isn't done, OunceNet will save your work as an Incomplete Intake, even if you had in fact completed all of the steps earlier.
- From this final screen, choose one of three ways to exit the intake: **Enter More Data for this Participant**, **Return to Home Screen**, or **Save My Work and Quit**.
- Once you exit this screen you cannot return to any of the intake steps; however, you can still access and revise any of the intake data through the *Intake Data* screen. The *Intake Data* screen is accessed through the *Participant Information* screen.

Participant Information

Participant Information

Once the intake process is complete, the *Participant Information* screen is where you will enter all additional data for a participant. This screen is the hub for participant information, serving two main functions. First, it displays the participant's main information such as her current **Core Component**, **Enrollment Status**, and **Service Intensity Level**, as well as the **Staff** and **Groups** to which she is currently assigned. Second, it is the entry point to the other screens where participant data is entered or updated, including the *Participant Outcome Indicators*, *Prenatal and Child*, and *Intake Data* screens.

To Display Participant Information

- In the *Home* screen, click **Participants**. This brings you to the *Participant* screen.
- OunceNet will pull up a list of currently Active participants in the box on the lower left. If you wish, you may filter a list yourself by selecting your choices of **Core Component** and **Enrollment**, then entering a **Last Name** and/or **First Name**, and click **Search**.

The screenshot shows the OunceNet interface. At the top, there's a header with 'the Ounce' logo, 'OunceNet Ounce of Prevention Fund Illinois Birth to Three Institute', and navigation links for 'Home' and 'Quit'. Below the header, a breadcrumb trail reads 'Main > Participant >'. The main section is titled 'PARTICIPANT' and contains a 'Search Options' form with fields for 'Core' (set to 'Doula'), 'Enrollment' (set to 'Active'), 'Last Name', 'First Name', and 'Site' (set to 'OFF Doula Only'). A 'Search' button is below these fields. Below the search form, there are two boxes: 'Completed Intakes' and 'Incomplete Intakes'. The 'Completed Intakes' box contains a list of participants: 'A, testparticipant PID: 25111', 'D, Linda PID: 24288', 'Doe, Kathy PID: 23639', 'Test1, Angel PID: 25317', 'Test2, Jackie PID: 25323' (highlighted), and 'Valence, Iris PID: 25293'. There are 'Select' and 'Glance' buttons next to this list. The 'Incomplete Intakes' box is empty and has 'Select Intake' and 'Add New' buttons.

- Once you find the name that you want in the **Completed Intakes** box, click the name and then **Select**. This takes you to the *Participant Information* screen.

The screenshot shows the 'Participant Information' screen for 'Jackie'. The header is the same as the previous screen. The breadcrumb trail now reads 'Main > Participant > ParticipantInformation >'. The main section is titled 'Participant Information'. It displays 'Participant Name: Jackie' and 'Test2'. Below this, there are three sections: 'Core Component' (set to 'Doula'), 'Enrollment Status' (set to 'Active'), and 'Service Intensity' (set to 'Doula Home Visiting'). There are also links for 'Group Assigned', 'Staff Assigned', 'Participant Outcome Indicators', 'Prenatal and Child', and 'Intake Data'.

- The name of the participant you selected will appear at the top of the *Participant Information* screen. This participant's name will also appear on all subsequent participant screens.

Enrollment and Core Components

On the *Participant Information* screen, the participant's current **Enrollment Status** and **Core Component** are displayed.

To Enter Enrollment Information

- To add new enrollment information for a participant, simply click on the **Enrollment Status** or the **Core Component** link on the *Participant Information* screen. Clicking any of these links brings you to the *Enrollment* screen.
- On the *Enrollment* screen, you may then click **Add New Record**. Enter the **Date** of the new enrollment information and then select the new **Core Component**, **Enrollment Status**, and **Program Name**. Click **Update** to save your new record. Never use **Edit** to change a prior record unless it was entered incorrectly.

Start Date	Core Components	Status	Other Components	Program Name
7/1/2013	Doula	Closed		Edit DeleteS
1/1/2014	Doula	Active		Edit DeleteS

- If you designate an enrollment record as **Closed**, OunceNet will prompt you to choose a **Reason for Closing**.
- If you add a new record with a status other than Closed, then you must also add a new Service Intensity record. Click on the **Service Intensity** link of the new record after you add it. The **Service Intensity Level** for Active Doula participants is **Doula Home Visiting Model**. (see instructions on the following page)

Service Intensity Level

The *Participant Information* screen will always display the participant's most current **Service Intensity Level**. If the enrollment status or frequency of visits changes, you will need to add a new **Service Intensity** record.

To Enter a Service Intensity Level

- Click the **Service Intensity** link on the *Participant Information* screen.
- On the Service Intensity screen, click **Add New Record**.
- Enter the **Start Date** of the new Intensity Level and select the Intensity from the dropdown list. Any Active Doula participants must be assigned the Doula Home Visiting Model Service Intensity Level. The correct **Service Intensity** for participants on Creative Outreach is **Level X**.
- Click **Update** to save your new data.
- **Service Intensity** records are contained within enrollment records. Therefore, you must add a new **Service Intensity** record each time you add a new enrollment record.

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Home Quit

Main > Participant > Participant Information > Service Intensity >

PARTICIPANT
Service Intensity

Participant Name: Jackie Test2

For Core Component: Home Visiting Doula Other Component: Infant Mental Health

Enrollment Status of: Active Which began on: 1/1/2014 And ended on:

[Add New Record](#)

Start Date	Intensity	Edit	Delete
1/1/2014	Doula Home Visiting Model	Edit	Delete
1/1/2014	Doula Home Visiting Model	Edit	Delete
1/1/2014	Doula Home Visiting Model	Edit	Delete
10/1/2014	Doula Home Visiting Model	Update	Cancel Delete

Note: To view or change the **Service Intensity Levels** of a prior enrollment status, you must click the **Service Intensity** link that corresponds to that enrollment record on the *Enrollment* page.

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Home Quit

Main > Participant > Participant Information > Enrollment >

PARTICIPANT
Enrollment

Participant Name: Jackie Test2

[Add New Record](#)

Start Date	Core Components	Status	Other Components	Program Name	Edit	Delete	Service Intensity
7/1/2013	Doula	Closed			Edit	Delete	Service Intensity
1/1/2014	Doula	Active			Edit	Delete	Service Intensity

Group Assignment

The *Participant Information* screen displays all parent groups to which the participant is currently assigned.

To Assign a Group Service

- On the *Participant Information* screen, click the **Group Assigned** link. This will bring you to the *Assign Groups* screen.

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Home Quit

Main > Participant > ParticipantInformation >

PARTICIPANT
Participant Information

Participant Name: Jackie Test2

Core Component Enrollment Status Service Intensity

Doula Active Doula Home Visiting

Group Assigned

Participant Outcome Indicators
Prenatal and Child
Intake Data

Staff Assigned

- Click the link to **Add New Group Membership**.
- Enter the **Start Date** and select the **Group Name** from the dropdown list. Only groups that have been entered in the Agency section of OunceNet will appear on the dropdown list. If your group does not appear on the list, you will need to enter it in the Agency section before proceeding.
- Click **Update** to save your record.

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Illinois Birth to Three Institute

Home Quit

Main > Participant > ParticipantInformation > AssignGroups >

PARTICIPANT
Assign Groups

Participant Name: Jackie Test2

Add New Group Membership

Start Date	Group Name	Remove From Roster On
10/1/2014	Mom's Social (test)	

Update Cancel Delete

You can remove a name from a group roster by clicking Edit, then entering the last date you would like them to appear on the list. If the participant never attended a group session and you would like to remove their name from the roster, you may simply click **Delete** (Delete will remove all past records of attendance, so it should only be used if the participant never attended the group.)

Staff Assignment

The names of all staff to which a participant is currently assigned will appear on the *Participant Information* screen.

To Manage Staff Assignments

- On the *Participant Information* screen, click the **Staff Assigned** link. This brings you to the *Assign Staff* screen.

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Illinois Birth to Three Institute

Home Quit

Main > Participant > ParticipantInformation >

PARTICIPANT
Participant Information

Participant Name: Jackie Test2

Core Component Enrollment Status Service Intensity

Doula Active Doula Home Visiting

Group Assigned Staff Assigned

Participant Outcome Indicators
Prenatal and Child
Intake Data

- Click **Add New Record** and enter the **Start Date** of the staff assignment.
- Select the name of the staff person assigned to the participant from the dropdown list and select the **Service Provided**.
- Click **Update** to save your entry.
- When the participant leaves the program or is transferred to another staff person, click **Edit** and fill in the **End Date** for the staff person.
- Click **Add New Record** and repeat the process above when the participant begins services with another staff person.

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Ounce of Prevention Fund
Illinois Birth to Three Institute

Home Quit

Main > Participant > ParticipantInformation > AssignStaff >

PARTICIPANT
Assign Staff

Participant Name: Jackie Test2

Add New Record

Start Date	End Date :	Staff Name :	Service Provided :
10/1/2014		Doula, Ms.; StaffID: 2324	Doula Caseload

Update Cancel Delete

Remember that assigning participants to staff has no effect on your enrollment numbers. Doula participants are counted as such because they carry a Doula enrollment record, not because they are assigned to a Doula staff person.

Intake Data Updates

To update or review demographic information about a participant after the intake process is complete, you may do so on the *Intake Data* screen.

To Update Intake Information

- On the *Participant Information* screen, click the **Intake Data** link. This brings you to the *Intake Data* screen.

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Illinois Birth to Three Institute

Home Quit

Main > Participant > ParticipantInformation >

PARTICIPANT Participant Information

Participant Name: Jackie Test2

Core Component Enrollment Status Service Intensity

Doula Active Doula Home Visiting

Group Assigned Staff Assigned

Mom's Social (test) Ms. Doula

Participant Outcome Indicators

Prenatal and Child

Intake Data

- The participant's demographic data entered during the intake process will appear on this screen. If anything was left blank or entered incorrectly during the intake process, you may update it here.
- To change any information, simply enter it over the old information and click **Save Changes**.
- Under **Other Information** are links to fields that are more likely to be updated: **Address**, **Marital Status**, and **DCFS Ward Status**.
- To update the address, marital status or DCFS status of a participant, simply click the corresponding link, click **Add New Record**, enter the new data, and click **Update** or **Save** to save your changes.

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Home Quit

Main > Participant > ParticipantInformation > IntakeData >

PARTICIPANT Intake Data

Participant Name: Jackie Test2 Save Changes

Parental Consent: Yes No Income Eligible: Yes

Date of Birth: 2/14/1998 Nickname: Intake Performed By: Doula, Ms.; StaffID: 2324

Gender: Female Language: English Guardian's First Name:

Ethnicity: Hispanic Referred From: Education Or Sch Guardian's Last Name:

Emergency Contact

First Name Last Name Relationship

Address Apt#

City State Zip Code Phone

Other Information

Address

Marital Status

DCFS Ward Status

Current Living Situation

Two Parent Family

One Parent Family

Foster

Step Home

Institution

Participant Medical Insurance

Medicaid

Participant in RCT:

Participant Receives TANF: Yes

Participant Outcome Indicators

The *Outcome Indicators* screen serves as the hub for all participant outcome information.

- Click on the **Participant Outcome Indicators** link on the *Participant Information* screen.

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Illinois Birth to Three Institute

Home Quit

Main > Participant > Participant Information >

PARTICIPANT

Participant Information

Participant Name: Jackie Test2

Core Component: Doula

Enrollment Status: Active

Service Intensity: Doula Home Visiting

Group Assigned: Mom's Social (test)

Staff Assigned: Ms. Doula

Participant Outcome Indicators
Prenatal and Child Intake Data

- The *Outcome Indicators* screen contains links to the participant's **Birth Plan**, **Transience/Homelessness**, **Referrals**, **DCFS Reports**, **Education**, **Employment**, **Medical Home**, **Birth Control**, and **WIC** outcome data. The screen also tells you when indicators were last updated, and for some, the last status.
- To view or enter more information for any of these Outcome Indicators, click the link for the data screen you wish to see.
- The links for Outcomes that are not relevant for Doula only participants are non-functioning; therefore, you are not able to enter data for those fields.

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Illinois Birth to Three Institute

Home Quit

Main > Participant > Participant Information > Outcome Indicators >

PARTICIPANT

Outcome Indicators

Participant Name: Jackie Test2

Outcome Indicator	Last Update	Outcome Indicator	Last Update	Status
Service Plan		Education	10/15/2014	Actively Enrolled
Parental Efficacy		Employment	10/15/2014	Full Time Student
Transience/Homelessness	10/15/2014	Medical Home	10/15/2014	Clinic
Referrals		Birth Control	10/15/2014	Not Using
DCFS Reports		WIC	10/15/2014	Receives
Participant Patterns		CESD-Depression		
Birth Plan	10/15/2014	EPDS-Depression		

Birth Plan

From the *Outcome Indicators* screen, click the **Birth Plan** link.

To Add a Birth Plan

- Click **Add New Record**.
- Enter the date the birth plan went into effect in the **Plan Date** field.
- Click the Yes or No box to indicate that this is a **Birth Plan**.
- Click **Update** to save your new record.

The screenshot shows the OunceNet web application interface. At the top, the header includes 'the Ounce' logo, 'OunceNet Ounce of Prevention Fund Illinois Birth to Three Institute', and navigation links for 'Home' and 'Quit'. Below the header, a breadcrumb trail reads 'Main > Participant > Participant Information > Outcome Indicators > Birth Plans >'. The main content area is titled 'PARTICIPANT Birth Plans'. It displays 'Participant Name: Jackie Test2' and a link for 'Add New Record'. Below this is a form with a 'Plan Date' field containing '10/15/2014', a 'Birth Plan' checkbox with 'Yes' selected, and buttons for 'Edit' and 'Delete'.

Participant Name: Jackie Test2	
Add New Record	
Plan Date:	Birth Plan
10/15/2014	<input checked="" type="radio"/> Yes <input type="radio"/> No Edit Delete

Birth plans are expected to be completed prenatally. For participants that enroll in the last month of pregnancy, birth plans should be completed as soon as possible.

As with outcome indicators or other records, you may occasionally need to edit or delete a prior record that was entered erroneously. To do this:

- Click **Edit** next to the record to be modified.
- Make any necessary modifications to previous data and click **Update** to save your changes.
- To remove the record from the OunceNet system entirely, click **Delete**.

In general, you will need to use the **Edit** or **Delete** functions unless you are correcting a mistake. When updating old records with new information, always use **Add New Record**; do not **Edit** the prior record.

Transience/Homelessness

From the *Outcome Indicators* screen, click the **Transience/Homelessness** link. This link takes you to the *Transience* screen.

Participants qualify as homeless if they have been staying somewhere temporary, unstable or inadequate. To help determine if the participant is homeless, click the **Definition of Homeless** link in the *Transience* screen to see the official definition of Homeless.

The screenshot shows the OunceNet interface. At the top, the logo 'the Ounce' is on the left, and 'OunceNet Ounce of Prevention Fund Illinois Birth to Three Institute' is on the right. Navigation links 'Home' and 'Quit' are in the top right. A breadcrumb trail reads 'Main > Participant > Participant Information > Outcome Indicators > Transience >'. Below this is a blue header bar with 'PARTICIPANT' and 'Transience'. The main content area shows 'Participant Name: Jackie Test2' and a link 'Definition Of Homeless'. Below this is a table with two columns: 'Date' and '# Days Homeless In Past 6 Months'. The table contains one row with the date '10/15/2014' and the value '0'. To the right of the table are 'Edit' and 'Delete' links. An 'Add New Record' link is located above the table.

Date	# Days Homeless In Past 6 Months
10/15/2014	0

To Add a New Record

- Click the **Add New Record** link, which will provide you with two new fields: **Date** and **# Days Homeless in Past 6 Months**.
- Enter the **Date** and appropriate number of days.
- Click **Update** to save your new record.
- To edit or delete an existing record, please refer to the instructions listed under the Birth Plan outcome indicator (p. 36).

This information must be entered at intake and should be updated if there is a change in the participant's status during the course of program enrollment.

Referrals

From the *Outcome Indicators* screen, click the **Referrals** link. This brings you to the *Referral Follow-Ups* screen, which lists all referrals given to the participant so far. This screen can also be accessed from the *Referral* screen (the screen used to enter new referrals) by clicking **Show All Referrals**.

To Update the Result of a Prior Referral

- Click **Edit** next to the referral you would like to update on this screen. After you select a new result, click **Update** to save your changes.
- To change anything other than the result, click **Details** next to the referral. You may then edit any information about the referral. Click **Submit** to save your changes.

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Illinois Birth to Three Institute

Home Quit

Main » Participant » Participant Information » Outcome Indicators » Referral Follow Ups »

PARTICIPANT

Referral Follow Ups

Participant Name: Susan Smith

[Enter More Referrals In The Service Ledger](#)

Date	Agency Referred To:	Result			
7/1/2008	Families, Inc.	Services Received	Edit	Delete	Details
8/19/2008	ABC Agency	Services Received	Update	Cancel	Delete Details

Services Received
Services Denied/Ineligible
Services Refused
Wait Listed

To Add a New Referral

- Click the **Enter More Referrals in the Service Ledger** link. This will take you to the *Service Ledger* screen.
- On the *Service Ledger* screen, select **Referral** as the type of New Service you would like to enter and then click **Enter New Services**. This will take you to the *Referral* screen.
- Enter the referral data and click **Submit**.

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Illinois Birth to Three Institute

Home Quit

Main » Participant » Participant Information » Outcome Indicators » Referral Follow Ups » Service Ledger »

SERVICE LEDGER

Search Options

Date: 8/19/2008 Search

Staff Name: SuperUser, SuperUser; StaffID: 51

Site: OFF

August 2008

New Service: Individual Contact, Home Visit, Doula Home Visit, Doula Hosp. Service, Group Service, Community Education, **Referral**, Meeting, Staff Supervision

Enter New Services

Start Time	Service Type	Name or Description
1		

DCFS Reports

From the *Outcome Indicators* screen, click the DCFS Reports link. This brings you to the *DCFS Activity* screen.

Date of DCFS Report:	Who is the Victim of Suspected Abuse?	Who Made the DCFS Hotline Report?	What was the Outcome of the Report?	
2/15/2008	Child	Law Enforcement	Unknown	Update Cancel Delete

To Add a New DCFS Report Record

- Click **Add New Record**.
- Enter the **Date of DCFS Report**. You may estimate the date if you do not have the exact date.
- Select a response to: **Who is the Victim of Suspected Abuse?** Options include Participant or Child.
- Select a response to: **Who Made the DCFS Hotline Report?**
- Select a response to: **What was the Outcome of the Report?** Options are Unfounded/Not Indicated, Founded/Indicated, or Unknown.
- Click **Update** to save your record.
- Note that information regarding the outcome or who made the report is not needed in order to record the report; you may select Unknown for this information. It is important to enter all DCFS reports, whether or not this information is known.
- To edit or delete a prior report record, please refer to the instructions listed on p. 36.

Education

From the *Outcome Indicators* screen, click the Education link. This link takes the user to the *Education Status* screen.

The screenshot shows the OunceNet web application interface. At the top, the header includes 'the Ounce' logo, 'OunceNet', 'Ounce of Prevention Fund', and 'Illinois Birth to Three Institute'. Navigation links include 'Main', '>Participant', '>ParticipantInformation', '>OutcomeIndicators', and '>EducationStatus'. The main content area is titled 'PARTICIPANT Education Status' and shows the participant's name as 'Susan Smith'. Below the name is an 'Add New Record' link. A table displays the participant's education status records. The first record shows a 'Start Date' of '7/3/2008', a 'Status' of 'Actively Enrolled', a 'Level' of '10th Grade', and an 'ESL' status of 'No'. A second record is partially visible with a 'Status' of 'Dropped Out' and a 'Level' of '10th Grade'. A dropdown menu is open for the 'Status' field, showing options: 'Actively Enrolled', 'Completed/Graduated', 'Dropped Out', 'Never Enrolled', and 'Don't know'. An 'Update' button is visible at the bottom right of the table.

Start Date	Status	Level	ESL
7/3/2008	Actively Enrolled	10th Grade	No
	Dropped Out	10th Grade	No

To Add a New Education Status Record

- Click **Add New Record**.
- Enter the **Start Date** for the new education status. This is the date that you received the information from the participant, not the date that the status began.
- For the **Status** and **Level** fields, select options to describe the participant's current school involvement.
- There are two choices for **GED** class levels. One choice indicates GED classes where the participant's reading level is less than 12th Grade. The other choice indicates a reading level at or above 12th Grade. (When participants complete their GED, they are automatically assigned a 12th Grade reading level by the system due to DHS reporting requirements.)
- Select Yes for **ESL** if the participant is taking English as a Second Language classes; otherwise select **No**.
- Click **Update** to save your record.
- To edit or delete a prior record, please refer to the instructions on p. 36.

This information must be entered at intake and if there are any changes to the participant's status during the course of program enrollment.

Employment

From the *Outcome Indicators* screen, click the **Employment** link. The link takes you to the *Employment Status* screen.

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Home Quit

Main > Participant > Participant Information > Outcome Indicators > Employment Status >

PARTICIPANT
Employment Status

Participant Name: Susan Smith

[Add New Record](#)

Date	Status
2/10/2008	Full Time

Full Time
Part Time
Temporary Or Seasonal
Not Working
Full Time Student
On Disability
Unknown
Not Applicable

[Update](#) [Cancel](#) [Delete](#)

To Add a New Employment Record

- Click **Add New Record**.
- Enter the employment **Start Date**. This is the date that you received the information from the participant, not the date that the status began.
- Select the employment **Status** from the following dropdown options: Full Time, Part Time, Temporary or Seasonal, Not Working, Full Time Student, On Disability, Unknown, or Not Applicable.
- Click **Update** to save the new record.
- To edit or delete a prior record, please refer to the instructions on p. 36.

This information must be entered at intake and should be updated if there is a change in the participant's status during the course of program enrollment.

Medical Home

From the *Outcome Indicators* screen, click the **Medical Home** link. This link takes the user to the *Participant Medical Home* screen

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Main > Participant > Participant Information > Outcome Indicators > Participant Medical Home >

PARTICIPANT
Participant Medical Home

Participant Name: Susan Bachman

[Add New Record](#)

Start Date	Medical Home	
7/10/2008	Clinic	Edit Delete
		Update Cancel Delete

Clinic
Private Doctor
Other
None
Unknown

To Add a New Medical Home Record

- Click **Add New Record**.
- Enter the new medical home **Start Date**. This is the date that you gathered the information from the participant, not the date that the status began.
- Select the **Medical Home** from the dropdown box. Options are Clinic, Private Doctor, None, Unknown, and Other.
- Click **Update** to save your new record.
- To edit or delete a prior record, please refer to the instructions on p. 36.

This information must be entered at intake and should be updated if there is a change in the participant's status during the course of program enrollment.

Birth Control

From the *Outcome Indicators* screen, click the **Birth Control** link. This link takes the user to the *Birth Control Status* screen.

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Home Quit

Main > Participant > Participant Information > Outcome Indicators > BirthControlStatus >

PARTICIPANT Birth Control Status

Participant Name: Susan Bachman

[Add New Record](#)

Start Date	Status	
7/10/2008	Using (with STD Protection)	Edit Delete

▼ [Update](#) [Cancel](#) [Delete](#)

- Using (with STD Protection)
- Using (without STD Protection)
- Abstinent
- Not Using
- Unknown

To Add a New Birth Control Record

- Click **Add New Record**.
- Enter the new birth control status **Start Date**. This is the date that you gathered the information from the participant, not the date that the status began.
- Select the new birth control **Status** from the dropdown box.
- Using (with STD protection) should be selected if the participant is using a form of birth control that also protects her from sexually transmitted diseases (i.e., latex condoms).
- Using (without STD protection) should be selected if the participant is using a form of birth control that does not protect against sexually transmitted diseases (e.g., birth control pills). The other options are Abstinent, Not Using, and Unknown.
- Click **Update** to save the new record.
- To edit or delete a prior record, please refer to the instructions on p. 36.

This information must be entered as soon as possible after intake and should be updated if there are any changes to the participant's status during the course of program enrollment. It is particularly important to collect and update this information following the child's birth.

WIC

From the *Outcome Indicators* screen, click the **WIC** link. This link takes the user to the *WIC Status* screen.

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Illinois Birth to Three Institute

Home Quit

Main >Participant >ParticipantInformation >OutcomeIndicators >WicStatus >

PARTICIPANT

WIC Status

Participant Name: Snow White

[Add New Record](#)

Start Date	Status	
4/1/2010	Receives	Update Cancel Delete

Receives
Referred (not receiving yet)
Refused
Not Needed

To Add a New WIC Record

- Click **Add New Record**.
- Enter the new WIC status **Start Date**. This is the date that you gathered the information, not the date that the status began.
- Select the new **WIC Status** that best describes the participant's situation in regards to WIC services. Options are Receives, Referred (not receiving yet), Refused, or Not Needed. If no options are an exact match, simply choose the closest one.
- Click **Update** to save the record.
- To edit or delete a prior record, please refer to the instructions on p. 36.

This information must be entered at intake and should be updated if there is a change in the participant's status during the course of program enrollment.

Prenatal and Child

Introduction to Prenatal and Child

All of a participant's pregnancies, regardless of the outcome, must be entered in OunceNet. Prenatal and Child records are kept together in the system. Therefore, a Prenatal and Child record may represent just a pregnancy, a pregnancy that became a child, or a pregnancy that ended without a birth. Usually a record will begin in OunceNet as a pregnancy, then as a child after the birth takes place.

Regardless of age or circumstance, every pregnancy should be entered. If a pregnancy did not result in birth, the Pregnancy Outcome field can be used to indicate this. If a child was born but for whatever reason should not be counted towards Program Outcomes, the child should still be entered into OunceNet.

All Prenatal and Child records are initially entered on the *Prenatal and Child* screen. Entering a due date alone indicates that the record represents a pregnancy. If the pregnancy has not concluded, then no further data entry is needed. However, if the child was born or if the pregnancy ended for any other reason, then the user must proceed to the *Child Intake* screen.

The *Child Intake* screen is accessed from the *Child Data* screen. On the *Child Data* screen the user will also see links to all the other child data areas, such as immunizations and developmental screenings. The *Child Intake* screen must be completed first, before any of the other child data areas are entered. The *Child Intake* screen is very important because it determines how that child record will be counted towards the Program Outcomes. OunceNet will only count live births that have not been removed from the statistics. The *Child Intake* screen also contains all of the Birth Outcome Indicators such as birth weight and delivery type. Finally, it provides access to the *Doula Data* screen, which should be completed if the participant is receiving Doula services.

Once the *Child Intake* screen is complete, the user can proceed to all of the other child areas of the system. The *Child Data* screen provides access to those areas, and helps the user keep abreast of the child's feeding status, child care, and father involvement.

Child Intake

A child/prenatal intake must be completed for every pregnancy of each Active participant. Any children not intended to count toward program statistics (e.g., children not living with the participant) can be designated as such on the *Child Intake* screen, but should still be entered into OunceNet. To enter a new pregnancy, you must first access the *Participant Information* screen. On this screen, click the **Prenatal and Child** link.

The screenshot shows the 'Participant Information' screen for Jackie. The 'Prenatal and Child' link under 'Participant Outcome Indicators' is circled in red.

Participant Name: Jackie Test2

Core Component: Doula Enrollment Status: Active Service Intensity: Doula Home Visiting

Group Assigned: Mom's Social (test) Staff Assigned: Ms. Doula

Participant Outcome Indicators: **Prenatal and Child** Intake Data

On the *Prenatal and Child* screen, click the option to **Add New Prenatal or Child Record**.

The screenshot shows the 'Prenatal And Child' screen for Jackie. The 'Add New Prenatal or Child Record' link is highlighted.

Participant Name: Jackie Test2

[Add New Prenatal or Child Record](#)

Due Date	First Name	Last Name	DOB	
4/10/2014	James	Test2	4/15/2014	Edit Delete Details

- To enter a new pregnancy, fill in the **Due Date**, then click **Update**. Come back when the child is born and click **Edit** to fill in the Name and DOB (Date of Birth).
- The child intake is still NOT COMPLETE at this point. To complete a child intake, click **Details**. This link takes you to the *Child Data* screen. The *Child Data* screen serves as a hub for the child's information, with links to all of the child's screens.

- Click the **Child Intake** link at the top of the screen to access the *Child Intake* screen. This is where you will complete the birth information.

- Enter the **Due Date**, **First Name**, **Last Name**, and **Birth Date** if they do not already appear. Enter 1, 2 or 3 for the **Trimester Medical Care Began**.
- Select the **Pregnancy Outcome**. If the pregnancy outcome was a live birth, select the baby's **Gender**, **Ethnicity**, **Weight at Birth** in pounds and ounces, and **Delivery Type**.
- Select **Initial Birth in Program** if this is the participant's first child while participating in your program. Select **Subsequent Birth in Program** if this is not the participant's first child while in your program.
- Enter **Breastfeeding** information for the child. You may enter Unknown and return later to update the information if you do not yet know the breastfeeding status.
- Enter **Medical Insurance** for the child.

- If appropriate, click the **Doula Data** to enter Doula information.

The screenshot shows the OunceNet web application interface. At the top, the header includes the Ounce logo, OunceNet text, and navigation links for Home and Quit. A breadcrumb trail reads: Main > Participant > Participant Information > PrenatalAndChild > ChildData > ChildIntake > DoulaData >. Below this, a blue bar contains the text 'PARTICIPANT' and 'Doula Data'. The main form area is titled 'Doula Data' and contains a 'Submit' button. The form fields are as follows:

Child Name: Vicki Williams	
Birth Attendance	
Doula	<input checked="" type="radio"/> Yes <input type="radio"/> No
Father	<input checked="" type="radio"/> Yes <input type="radio"/> No
Participant's Mother	<input checked="" type="radio"/> Yes <input type="radio"/> No
Father's Mother	<input checked="" type="radio"/> Yes <input type="radio"/> No
Sibling or Friend	<input checked="" type="radio"/> Yes <input type="radio"/> No
Healthcare Provider's Name	<input type="text" value="Dr. Kim"/>
Epidural Given:	<input type="text" value="Yes"/>
Provider Known to Participant	<input type="text" value="Yes"/>
What kind of medical insurance does the child have	<input type="text" value="Medicaid"/>

- If the child should not be tracked by your program, fill in the fields at the bottom of the page; otherwise, leave them blank (see p.50)
- Click **Submit** to save your changes.

Removing a Child from Outcome Statistics

The bottom half of the *Child Intake* screen allows you to remove a child's name from consideration in your program's outcomes. To do this, select the reason for by choosing an option in the **Remove Child from Statistics Because** field.

- Enter the **Date** of the removal status. If a child was never in the program, this date should be the same as their date of birth.
- Click **Submit** to save this change. All fields at the top of the page must also be complete for this to save your data.
- If you are unclear about which situations qualify for removal from program statistics, consult your Program Manager.

To Change the Child's DCFS Status

- Next to the date for **Remove Child from Statistics Because**, there is a link for **Child DCFS Status**.
- Click **Add New Record**, then enter the **Date** and select a dropdown option for **Child Ward of DCFS?** Options are Yes, No, Unknown, or Not Applicable. Click **Update** to save the new record.
- When the screen is complete, click **Child Intake** on the **Navigation Bar** to return to the *Child Intake* screen.

Editing or Deleting a Prior Record

Many screens in the Prenatal and Child section, including the *Prenatal and Child* screen, give you the option to **Edit** or **Delete** a prior record. To update information for a participant or child you usually add a new record rather than changing a prior entry. Generally you only use **Edit** if you want to change information that was entered erroneously, or if certain fields of a prior record were left blank (such as the **Date of Birth** for a pregnant participant's unborn child) and you would like to now complete them.

To Edit a Prior Record

- Click **Edit** next to the record you would like to modify.
- This will give you access to each field's dropdown and text boxes.
- Select the new option for each field that you would like to change. To change any information previously entered in a text box, simply type over the old data.
- Click **Update** to save the data you just entered.

To Delete a Prior Record

- Click **Delete** next to the record you would like to remove if you wish to permanently remove it from the OunceNet system.
- Using **Delete** removes all history of the record from OunceNet, so you generally only use this option if the record was originally entered in error.

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Home Quit

Main > Participant > Participant Information > PrenatalAndChild >

PARTICIPANT

Prenatal And Child

Participant Name: Mary Contrary

[Add New Prenatal or Child Record](#)

Due Date	First Name	Last Name	DOB	
1/5/2007	Kyle	Smith	1/2/2007	Edit Delete Details
11/24/2008	Mary	Smith	11/20/2008	Edit Delete Details

Father Involvement

In the *Child Data* screen, the Last Update and Status information for father involvement is displayed. From the *Child Data* screen, click the **Father Involvement** link. This takes you to the *Father Involvement* screen.

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Home Quit

Main > Participant > Participant Information > PrenatalAndChild > ChildData >

PARTICIPANT

Child Data

Child Name: James Test2

Child Intake

	Last Update	Status
Developmental Screenings		
Well Child Visits		Total Visits
Immunizations		
Father Involvement		
Child Care		
Child Medical Home		
Feeding (new version)		

Hrs/Wk

To Add a New Father Involvement Status

- Click **Add New Record**.
- In the **Date** field, enter the date you asked the participant about father involvement.
- Select **Involvement** to enter information on the frequency of father involvement. Frequency options are Daily, Weekly, Less Than Weekly, Never and Unknown.
- Click **Update** to save the data you entered.
- To edit a prior record, please refer to the instructions on page 51.
- After the new frequency is added, return to previous screens by clicking a link on the **Navigation Bar** or click **Quit** to leave OunceNet.

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Home Quit

Main > Participant > Participant Information > PrenatalAndChild > ChildData > FatherInvolvement >

PARTICIPANT

Father Involvement

Child Name: Gabriel Sanchez

Add New Record

Date:	Involvement	
9/15/2008	Daily	Edit Delete

Child Medical Home

In the *Child Data* screen, the Last Update and Status information for child medical home is displayed. From the *Child Data* screen, click the **Child Medical Home** link. This takes you to the *Child Medical Home* screen.

The screenshot shows the OunceNet interface. The header includes the Ounce logo, OunceNet title, and navigation links for Home and Quit. A breadcrumb trail reads: Main > Participant > Participant Information > PrenatalAndChild > ChildData >. Below this is a 'PARTICIPANT' section with a 'Child Data' tab. The main content area displays 'Child Name: James Test2' and a 'Child Intake' section. This section contains a list of categories on the left: Developmental Screenings, Well Child Visits, Immunizations, Father Involvement, Child Care, Child Medical Home, and Feeding (new version). To the right, there are input fields for 'Last Update' and 'Status' for each category. The 'Child Medical Home' category has a dropdown menu for 'Status' and a text field for 'Hrs/Wk'.

To Add a Child Medical Home

- Click **Add New Record**.
- Enter the new child medical home **Start Date**. This is the date that you gathered the information from the participant.
- Select the **Medical Home** from the dropdown box. Options are Clinic, Private Doctor, None, Unknown, and Other.
- Click **Update** to save your new record.

The screenshot shows the OunceNet interface for the 'Child Medical Home' screen. The header is identical to the previous screenshot. The breadcrumb trail is: Main > Participant > Participant Information > PrenatalAndChild > ChildData > ChildMedicalHome >. Below the 'PARTICIPANT' section, the 'Child Medical Home' tab is active. The main content area displays 'Child Name: Terry Fake-Test' and an 'Add New Record' link. Below this is a form with two input fields: 'Start Date' and 'Medical Home'.

Child Care

In the *Child Data* screen, click the **Child Care** link. This brings you to the *Child Care* screen.

The screenshot shows the OunceNet interface. The top header includes the Ounce logo, OunceNet title, and navigation links (Home, Quit). A breadcrumb trail reads: Main > Participant > Participant Information > PrenatalAndChild > ChildData >. The main content area is titled 'Child Data' and shows 'Child Name: James Test2'. Below this is a 'Child Intake' section with a table for recording data. The table has columns for 'Last Update', 'Status', and 'Total Visits'. The rows are for 'Developmental Screenings', 'Well Child Visits', 'Immunizations', 'Father Involvement', 'Child Care', 'Child Medical Home', and 'Feeding (new version)'. The 'Child Care' row is highlighted with a dropdown menu showing 'Hrs/Wk'.

	Last Update	Status	Total Visits
Developmental Screenings			
Well Child Visits			
Immunizations			
Father Involvement			
Child Care			
Child Medical Home			
Feeding (new version)			

To Add a New Child Care Status

- Click **Add New Record**.
- Enter the date you gathered the information on child care from the participant.
- Select **Child Care Source** from the dropdown list. Select Home Based if the child is in a home-based day care setting such as a sitter's home. Other options are Child Care Center Based, Relative/Significant Other, Other, or Not Applicable. Select Not Applicable if the participant has no child care.
- Enter the number of **Hours of Child Care Per Week**. If the participant has no child care, enter 0.
- Click **Update** to save the data you entered.
- To edit a prior record, please refer to the instructions on page 51.
- After the new child care status is added, return to previous screens by clicking a link on the **Navigation Bar** or click **Quit** to leave OunceNet.

The screenshot shows the OunceNet interface. The top header includes the Ounce logo, OunceNet title, and navigation links (Home, Quit). A breadcrumb trail reads: Main > Participant > Participant Information > PrenatalAndChild > ChildData > CHILDCARE >. The main content area is titled 'Child Care' and shows 'Child Name: Gabriel Sanchez'. Below this is an 'Add New Record' link and a table for recording data. The table has columns for 'Date', 'Child Care Source', and 'Hrs Per Week'. The row shows '9/15/2008', 'Relative/Sig. Other', and '8'. There are 'Edit' and 'Delete' links next to the row.

Date	Child Care Source	Hrs Per Week
9/15/2008	Relative/Sig. Other	8

Feeding

Click the **Feeding** link on the *Child Data* screen. This takes you to the *Feeding Status* screen.

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Home Quit

Main > Participant > Participant Information > PrenatalAndChild > ChildData >

PARTICIPANT
Child Data

Child Name: James Test2

Child Intake

Developmental Screenings
Well Child Visits
Immunizations
Father Involvement
Child Care
Child Medical Home
Feeding (new version)

Last Update
Status
Total Visits
Hrs/Wk

To Add a New Feeding Status

- Click on the appropriate dropdown depending upon the child's age. The first field will be populated based upon the data entered on the *Child Intake* screen.
- Select the feeding status for the child's age. Options are Breast Milk, Breast Milk and Formula, Formula Only, and Unknown.
- When Formula Only is selected, you will be prompted to answer the last question, which asks at what age the child stopped breastfeeding. You may then also fill in all future time points as Formula Only, since the child will not return to breast milk.
- Click **Submit** to save the data entered.
- After the new status is added, return to previous screens by clicking a link on the **Navigation Bar** or click **Quit** to leave OunceNet.

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Home Quit

Main > Participant > Participant Information > PrenatalAndChild > ChildData > Feeding >

PARTICIPANT
Feeding Status

Child Name: WELLS JAVONIA

Submit

Was child breastfed or fed breast milk (even once) during the first week of life? (Initial): Yes

6 Weeks: Breast Milk

6 Months: Breast Milk

1 Year: Breast Milk and Formula

18 Months: Formula Only

2 Years: Formula Only

At what age was the child when mom stopped breastfeeding or feeding the child breast milk? 13 months

Service Ledger



Service Ledger Screens

Service Ledger

Individual Contact

Doula Home Visit

Doula Hospital Service

Group Service

Community Education

Referral

Referral Follow Ups (Participant Section)

Meeting

Supervision

Introduction to Service Ledger

One of the main purposes of the OunceNet system is to capture data concerning the quantity, intensity and diversity of services provided to participants. This is primarily achieved through the *Service Ledger* screens, where services provided by Ounce site staff are recorded. Those involved in the operating, administering, and funding of Ounce programs is often pose service-related questions: who were provided what services, when and where, by whom, for how long, and how successfully? The effective use of the *Service Ledger* screens can efficiently produce accurate responses to these and other questions.

The *Service Ledger* **IS NOT** intended to track time management. Many of the everyday tasks site staff perform in support of their direct service work are not captured by the limited number of services recorded in OunceNet. The only services that will be recorded in OunceNet are the following:

- Individual Contacts
- Doula Home Visits
- Doula Hospital Services
- Group Services
- Community Education
- Referrals
- Meetings
- Supervisions

Furthermore, with the exception of Doula Home Visits, services that are incomplete are also not recorded in OunceNet. To save staff time spent on data entry, OunceNet gathers information only on the select array of services it seeks to analyze: services that are specifically contracted in the program abstract or directly linked to the achievement of outcomes.

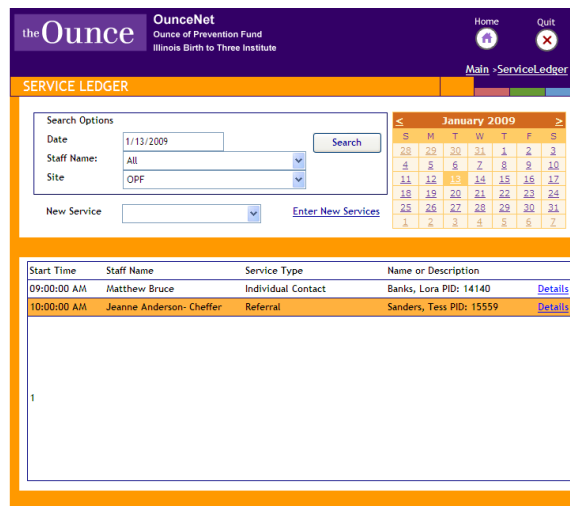
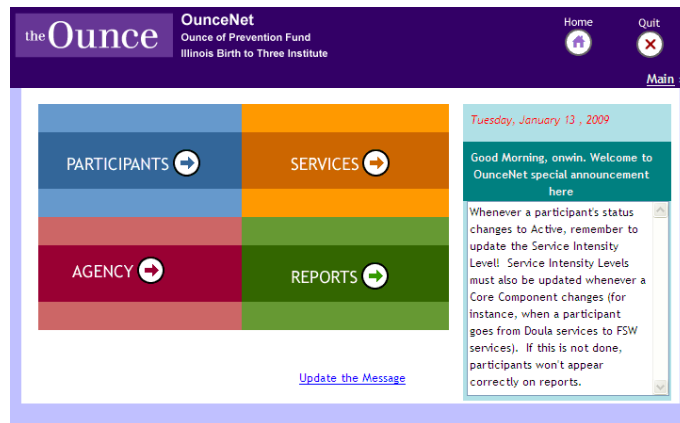
Using the Service Ledger

The *Service Ledger* allows you to record, delete, and modify all completed services. Click **Services** on the *Home* screen to reach the *Service Ledger*. The *Service Ledger* screen contains a calendar that allows you to scroll through days, months, and years by simply clicking on the calendar with your mouse.

There are also filter options that allow you to find services for a particular day, staff member and/or site. When you enter a date, staff name or site name and then click **Search**, OunceNet will find and list for you all of the services for the categories you chose.

There are other areas of OunceNet that will bring you to the *Service Ledger* screen if an entry is required. For example, in the *Participant Referral* screen, there is a link that brings users to the *Referral* page.

In most of the *Service Ledger* screens the **Date**, **Staff Name**, and **Site** fields will automatically default to the current date, your name, and your site. If you are entering data for a different date or person, remember to type in the appropriate date and select the appropriate staff person before proceeding.



Using the Service Ledger

The bottom half of the *Service Ledger* screen shows all entered services for the selected day, according to any specified filters. Otherwise, it will show all data for the entire day according to the staff member who logs into the system. If the entry must be changed, click on **Details** to modify the entry.

To Enter a New Service

- In the *Service Ledger* screen, first make sure the appropriate name is in the **Staff Name** box. If it isn't, simply use the dropdown box to select the correct staff name.
- The **Date** field will default to the current date. If you would like to enter a service from a prior date, type the prior date over the current date, or click on the appropriate date on the calendar.
- Select the type of **New Service** you would like to enter from the dropdown list.
- Click **Enter New Services** and the screen on which to enter the new service will appear.

To Find Entered Services

- In the *Service Ledger* screen, select **All** for Staff Name if you would like to see all services for all staff, select a particular name to see only that person's services.
- Enter the date you want by either typing it into the **Date** field or by simply clicking on the particular date on the calendar.
- Click **Search** to view all services for the specified staff and date.

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Home Quit

Main > ServiceLedger >

SERVICE LEDGER

Search Options

Date: 1/13/2009 Search

Staff Name: All

Site: OPF

New Service: Enter New Services

January 2009

S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Start Time	Staff Name	Service Type	Name or Description
09:00:00 AM	Matthew Bruce	Individual Contact	Banks, Lora PID: 14140 Details
10:00:00 AM	Jeanne Anderson- Cheffer	Referral	Sanders, Tess PID: 15559 Details

1

Service Screens

Each type of service entered has its own screen: *Individual Contact*, *Doula Home Visit*, *Doula Hospital Service*, *Group Service*, *Community Education*, *Referral*, *Meeting*, and *Staff Supervision*. There are three areas for each service screen. They are the people involved, General Service Details, and Special Service Details. These three sections may vary slightly based on the service. Each screen also includes a Submit button. This function will save all work entered in this screen and return the user to the main *Service Ledger* screen.

Individual Contact

The *Individual Contact* screen is where all new individual contact services are entered.

- Your name will appear in the **Primary Staff** field. To choose a name other than the one that appears, select one from the dropdown list. Select the **Participant** from the dropdown list.
- Fill in the service information in the appropriate fields. The date from the *Service Ledger* screen will appear in the **Date** field, so if you wish to enter another date simply type over it.
- If any other staff members participated in the service, click the **Select Additional Staff** link. Click **Yes** in the second column next to the name of any other staff person who participated; then click **Save**.
- When you have entered the data, click **Submit** to save your record and return to the *Service Ledger* screen.

The screenshot shows the 'Individual Contact' screen within the OunceNet application. The header includes the Ounce logo, 'OunceNet', 'Ounce of Prevention Fund', and 'Illinois Birth to Three Institute'. Navigation links for 'Home' and 'Quit' are in the top right. A breadcrumb trail reads 'Main > ServiceLedger > IndividualContact'. The main title is 'SERVICE LEDGER' with a sub-title 'Individual Contact'. There are 'Submit' and 'Delete' buttons. The form is divided into three main sections: 'Primary Staff' (with a dropdown showing 'SuperUser, SuperUser; StaffID: 51'), 'Participant' (with a 'SEARCH PARTICIPANT' link and dropdown), and 'Program Name' (with a dropdown showing 'OPF-Parents Too Soon'). Below these are two side-by-side sections: 'General Service Details' and 'Special Service Details'. 'General Service Details' includes fields for 'Date' (1/28/2010), 'Start Time', 'Duration' (Minutes), 'Father Participated' (dropdown), 'Result' (dropdown), and 'Topic' (text area). 'Special Service Details' includes 'If Referral Offered, Category:' (dropdown) and 'If Referral Offered, Result:' (dropdown). At the bottom left is a link 'SELECT ADDITIONAL STAFF'.

Doula Home Visit

- Select the **Participant**.
- Enter the service information in the appropriate fields. Remember that **Duration** is in minutes, not hours. Check to see that the **Date** showing is correct; if not, simply type the correct date of the service over it.
- Select the **Visit Type** (Prenatal or Postnatal) and the **CB FANA Type** (hold down on the Ctrl key to select more than one **CB FANA Type**).
- When you have entered the data, click **Submit** to save your Doula Home Visit record and return to the *Service Ledger* screen.

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Home Quit

Main > ServiceLedger > DoulaHomeVisit >

SERVICE LEDGER

Doula Home Visit

Submit Delete

Primary Staff: Hidalgo, Michelle; StaffID: 175 Participant: SEARCH PARTICIPANT Smith, Loretta PID: 13363 Program Name: OFF-Parents Too Soon

General Service Details

Date: 1/13/2009 Start Time: 9:00am

Duration: 60 Minutes Location: Participant's

Father Participated: Yes Result: Completed

Topics :

Special Service Details

Visit Type: Prenatal

CB FANA Type :

- Not Applicable
- Fetal Movement
- Fetal Hearing
- Fetal State
- Fetal Touch
- Fetal Sucking
- Post Natal FANA
- Fetal Vision

SELECT ADDITIONAL STAFF SELECT CHILDREN

Doula Hospital Service

- Doula Hospital Service records include any visit the Doula makes to the participant in the hospital or clinic when the visit did not include the actual birth.
- To ensure that the Doula receives credit for attending a birth, it is important to enter the data on the *Doula Data* screen. The *Doula Data* screen is accessed through the *Child Intake* screen.
- Enter the **Date**, **Start Time**, and **Duration**. Remember to enter the duration in minutes, not hours.
- Select whether or not the **Father Participated**, the **Result** of the hospital service, and who **Initiated** the service.
- If additional staff were involved, click **Select Additional Staff**, which takes you to a list of current staff members. Click **Yes** in the second column next to the names of any additional staff involved. The person entering the data will automatically be selected as the **Primary Staff**, but you may also change this designation if you wish. Click **Save** to save the data and return to the *Doula Hospital Service* screen.
- When you have entered the data, click **Submit** to save your record and return to the *Service Ledger* screen.

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Home Quit

[Main](#) > [ServiceLedger](#) > [DoulaHospitalService](#) >

SERVICE LEDGER

Doula Hospital Service

[Submit](#) [Delete](#)

Primary Staff: Participant: [SEARCH PARTICIPANT](#) Program Name:

General Service Details

Date: Start Time:

Duration: Minutes

Father Participated: Result:

[SELECT ADDITIONAL STAFF](#)

Special Service Details

Service Initiated :

Group Service

The *Group Service* screen is where the details and attendance of each individual group session are recorded.

- Select the **Group Name**.
- Enter the **Date**, **Start Time**, **Duration** of the group in minutes, and **Topics**.
- Select whether **Food** and any **Parent Child Activity** were included in the group service.
- Select the **Group Cycle**. If your program does not use cycles in group services, you may select First Cycle to indicate an annual cycle.
- Add **Number of Guests** attending group service and **Total Participants Attending** for group field trips.
- Click **Select Participants** and then click **Yes** next to the names of all participants who attended that particular group session. Click **Save** to return to the *Group Service* screen.
- To add additional staff present for the group, click the **Select Additional Staff** link. The first column will indicate the person entering the service as the **Primary Staff**, but you may change this designation if you wish. Under the second column, labeled **Involved**, click **Yes** next to the names of any other staff present for the group session. Click **Save** to return to the *Group Service* screen.
- When you have entered the data, click **Submit** to save the group service record and return to the *Service Ledger* screen.

The screenshot shows the OunceNet web application interface. At the top, the header includes the Ounce logo, OunceNet title, and navigation links for Home and Quit. Below the header, a breadcrumb trail reads 'Main > ServiceLedger > GroupService >'. The main section is titled 'SERVICE LEDGER' and 'Group Service'. It contains a form with fields for Primary Staff (a dropdown menu showing 'admin, admin; StaffID: 2323'), Group Name (a dropdown menu), and Program Name (a dropdown menu showing '*OPF Doula Only Program*'). There are 'Submit' and 'Delete' buttons. The form is divided into two sections: 'General Service Details' and 'Special Service Details'. The 'General Service Details' section includes fields for Date (11/10/2014), Start Time, Duration (with a 'Minutes' label), Number of Guests, Topics (a dropdown menu), and Total Participant Attending (a text input field). The 'Special Service Details' section includes dropdown menus for Food, Parent Child Activity, and Group Cycle. At the bottom of the form, there are two links: 'SELECT ADDITIONAL STAFF' and 'SELECT PARTICIPANTS'.

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Ounce of Prevention Fund
Illinois Birth to Three Institute

Home Quit

Main > ServiceLedger > GroupService >

SERVICE LEDGER

Group Service

Submit Delete

Primary Staff Group Name Program Name
admin, admin; StaffID: 2323 *OPF Doula Only Program*

General Service Details

Date 11/10/2014 Start Time
Duration Minutes Number of Guests
Topics
Total Participant Attending

Special Service Details

Food
Parent Child Activity
Group Cycle:

[SELECT ADDITIONAL STAFF](#) [SELECT PARTICIPANTS](#)

Community Education

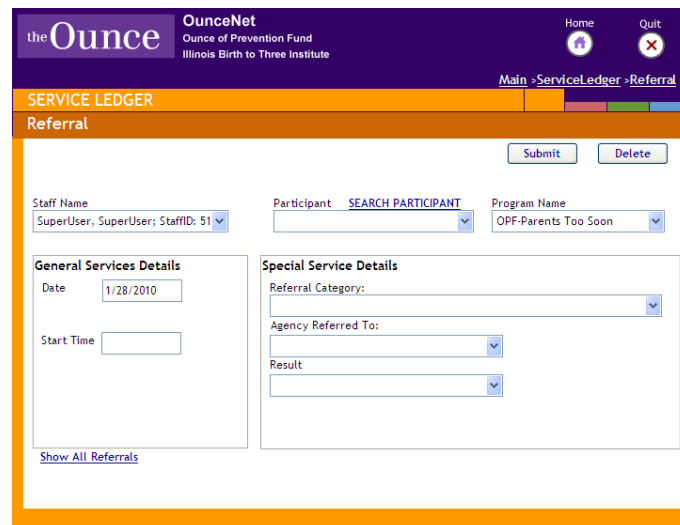
- To enter a community education service, first select the **Primary Staff** person involved in the event.
- Select an **Event Name**. The dropdown list of event names will be those that were entered into your program's contract at the beginning of the year. If you do not see the specific name of your event in the dropdown, select the general Community Event title from the dropdown list.
- Enter the **Date**, **Start Time**, **Duration** in minutes, and **Topics** discussed. If you chose Community Event as the name of your event, enter the actual name of the event here.
- In **Special Service Details**, select whether **Child Care** was provided, and enter the **Total Attending** the event.
- To add additional staff who participated in the event, click the **Select Additional Staff** link,
 - which takes you to a list of current staff members.
 - There are two columns. Under the **Primary Staff** column, choose only one staff name as the staff person most responsible for the event. If more than one person shared equal responsibility, just choose one name among them.
 - Under the **Involved** column, click **Yes** next to the names of all other staff who participated in the event.
 - Click **Save** to save this data and return to the *Community Education* screen.
- When you have entered the data, click **Submit** to save your record and return to the *Service Ledger* screen.

The screenshot shows the OunceNet web application interface. At the top, the header includes the Ounce logo, the text 'OunceNet Ounce of Prevention Fund Illinois Birth to Three Institute', and navigation links for 'Home' and 'Quit'. Below the header is a breadcrumb trail: 'Main > ServiceLedger > CommunityEducation >'. The main content area is titled 'SERVICE LEDGER' and 'Community Education'. It contains a form with the following fields: 'Primary Staff' (a dropdown menu showing 'Stephens, Michael; StaffID: 1542'), 'Event Name' (a dropdown menu), and 'Program Name' (a dropdown menu showing 'OPF-Parents Too Soon'). Below these are two sections: 'General Service Details' and 'Special Service Details'. The 'General Service Details' section includes 'Date' (1/30/2009), 'Start Time' (9:00 AM), 'Duration' (60 Minutes), and 'Topics' (a text input field). The 'Special Service Details' section includes 'Child Care' (a dropdown menu showing 'Yes') and 'Total Attending' (50). At the bottom of the form are 'Submit' and 'Delete' buttons. Below the form is a link labeled 'SELECT ADDITIONAL STAFF'.

Referral

When you provide participants with referrals to other programs, you should document these referrals on the *Referral* screen in the *Service Ledger*.

- To enter a referral in the *Service Ledger*, first select the **Staff Name** who provided the referral.
- Next, select the **Participant** who received the referral.
- Enter the **Date** that you provided the referral to the participant.
- Select the **Referral Category** and **Agency Referred To**. You may leave this field blank unless you would like to specify the agency.
- Select a **Result** to indicate the referral status. If you do not yet know the result of the referral, you may leave this field blank or select Unknown, and fill it in at a future date.
- If you wish to see all prior referrals entered into OunceNet for the participant, you may click the **Show All Referrals** link.
- When you have entered the data, click **Submit** to save your record and return to the *Service Ledger* screen.



The screenshot shows the OunceNet web application interface. At the top, the header includes the Ounce logo, OunceNet name, and navigation links for Home and Quit. Below the header, a breadcrumb trail reads 'Main > ServiceLedger > Referral'. The main content area is titled 'SERVICE LEDGER' and 'Referral'. It contains two columns of input fields. The left column, 'General Services Details', includes 'Staff Name' (a dropdown menu showing 'SuperUser, SuperUser; StaffID: 51'), 'Date' (a text box with '1/28/2010'), and 'Start Time' (a text box). The right column, 'Special Service Details', includes 'Participant' (a dropdown menu with 'SEARCH PARTICIPANT'), 'Program Name' (a dropdown menu with 'OPF-Parents Too Soon'), 'Referral Category' (a dropdown menu), 'Agency Referred To' (a dropdown menu), and 'Result' (a dropdown menu). At the bottom left of the form is a link 'Show All Referrals'. At the top right of the form are 'Submit' and 'Delete' buttons.

Meeting

- Select the **Meeting Type**. For meetings to count towards your contractual obligations, choose Team Meeting, not Staff Meeting.
- Enter the **Date**, **Start Time**, **Duration** in minutes, and **Topics** discussed.
- Enter the number for **Total Attending**.
- On the very bottom of the Meeting service screen, there are two links: **Select Additional Staff** and **Participants Discussed**.
- To indicate who participated in the meeting, click the **Select Additional Staff** link, which takes you to a list of current staff members.
 - Under the **Primary Staff** column, click **Yes** next to the one staff person most responsible for the meeting. OunceNet automatically selects the person entering the data, but you may change the designation if you wish.
 - Under the **Involved** column, click **Yes** next to the names of all other staff who attended the meeting.
 - Click **Save** to save this data and return to the *Meeting* screen.
- To indicate which, if any, participants were discussed during the meeting, click the **Participants Discussed** link.
 - This link takes you to a list of participants in the program. Click **Yes** next to the name of each participant discussed during this meeting.
 - Click **Save** to save this data and return to the *Meeting* screen.
- Click **Submit** to save your data.

The screenshot shows the OunceNet web application interface. At the top, the header includes the 'the Ounce' logo, 'OunceNet Ounce of Prevention Fund Illinois Birth to Three Institute', and navigation links for 'Home' and 'Quit'. Below the header, a breadcrumb trail reads 'Main > Service Ledger > Meeting >'. The main content area is titled 'Meeting' and contains a form with the following fields:

- Primary Staff:** A dropdown menu showing 'SuperUser, SuperUser; StaffID: !'.
- Meeting Type:** A dropdown menu showing 'Team Meeting'.
- Program Name:** A dropdown menu showing 'OPF-Parents Too Soon'.
- General Service Details:**
 - Date:** A text box containing '2/1/2010'.
 - Start Time:** A text box.
 - Duration:** A text box followed by 'Minutes'.
 - Topics:** A text box with a small 'OK' button to its right.
- Special Service Details:**
 - Total Attending:** A text box.
 - PCOG Completed:** Radio buttons for 'Yes' and 'No'.

At the bottom of the form, there are two links: 'SELECT ADDITIONAL STAFF' and 'PARTICIPANTS DISCUSSED'. The form also includes 'Submit' and 'Delete' buttons at the top right.

Supervision

The *Supervision* screen is only used by those who conduct and enter supervisions.

- In the *Supervision* screen, select the **Staff Name** (Supervisor) and **Supervision Type** from the dropdown lists.
- Enter the **Date**, **Start Time**, **Duration**, and **Topic** discussed during supervision.
- Select the **Supervisee**.
- Click on the **Participants Discussed** link, which is located at the very bottom of the *Supervision* screen.
 - Under **Involved**, click **Yes** next to the name of any participant discussed during the supervision. All other participant names will remain under their default status, No. Use your best judgment in choosing who was discussed. Generally you include any participant who was a major topic of discussion at the meeting.
 - Click **Save** to save your data and return to the *Supervision* screen.
- When you have entered the data, click **Submit** to save your record and return to the *Service Ledger* screen.

the Ounce OunceNet
Ounce of Prevention Fund
Illinois Birth to Three Institute

Home Quit

Main > Service Ledger > Supervision

SERVICE LEDGER
Supervision

Submit Delete

Staff Name(Supervisor)
SuperUser, SuperUser; StaffID: 51

Supervision Type

Program Name
OPF-Parents Too Soon

General Service Details

Date 2/1/2010 Start Time

Duration Minutes

Topic

Special Service Details

Supervisee

PCOG Completed:
☐ Yes ☐ No

[PARTICIPANTS DISCUSSED](#)

Quick Reference Guide

Quick Steps - Intake

To start an intake:

1. Click **Participant** on the *Home* screen.
2. Click the **Add New** button in the lower right corner of the *Participant* screen.

To resume an intake:

1. Find the name of the intake you want to complete in the Incomplete Intakes box.
2. Select the name by clicking on it once.
3. Click the **Select Intake** button to the right of the Incomplete Intakes box.

Quick Steps – Participant Step 1

1. Enter the new participant's first and last names.
2. Click **Yes** to the Consent Form question.
3. Select the **Program Name**.
4. Select the **Intake Type**.
5. Click the **Next Step** button below the Navigation Bar.

Quick Steps – Participant Step 3

For Doula Only Intakes:

1. Enter a valid non-future **Start Date**.
2. Select at least one **Core Component**.
3. Select a **Group at Intake** if applicable.
4. Click **Next Step**.

For Group Roster Only Intakes:

1. Select a **Group at Intake**.
2. Click **Next Step**.

Quick Steps – Participant Step 4

Click **Next Step**

Quick Steps – Participant Step 5

To Skip This Step:

1. Click **Next Step**.

To Assign Staff:

1. Click **Add New Record**.
2. Select the **Staff Name** and the **Service Provided** from the drop-down lists.
3. Click **Update**.
4. Repeat steps 1-3 as needed.
5. Click **Next Step**.

Quick Steps – Participant Step 6

1. Enter the participant's **Nick Name** if any.
2. Enter a valid **Date of Birth**.
3. Select the **Gender, Ethnicity, Marital Status**, where the participant was **Referred From, Language, Who Performed the Intake**, and whether the participant is a **Ward of State** at Intake.
4. Answer the four additional questions.
5. Select all appropriate answers for the **Current Living Situation**.
6. Click the **Next Step** button.

Quick Steps – Participant Step 7

1. Answer the question about the participant's permanent address.
2. Enter a **City**.
3. Select a **County**.
4. Select a **Community Area** if the city entered is Chicago.
5. If the participant has a permanent address enter their **Address** and **Zip Code**.
6. Enter the other required fields for your site.
7. Click **Next Step**.

Quick Steps – Completing Intake

1. If you do not need to review or edit any prior steps, click **Enter More Data** for this Participant, **Return to the Home Screen**, or **Save My Work and Sign Off**.
2. If you need to review or edit any prior step, click the link to that step.
3. After you have made any revisions to a prior step, click **Next Step** to save the changes, then continue clicking **Next Step** until you return to this screen.

Quick Steps – Participant Information

1. Click **Participants** in the *Home* screen.
2. To find a participant by name, enter the **Last** and **First Name**, or enter their first and last initials in the First Name and Last Name fields.
3. Click **Search**.
4. If the participant you want does not appear, try changing the **Enrollment** to **All** and click **Search** again.
5. Click on the name of the participant.
6. Click **Select**.

Quick Steps – Enrollment and Core Component

1. Click **Enrollment Status** or **Core Component**.
2. Click **Add New Record**.
3. Enter the **Date**.
4. Select the **Core Component**.
5. Select the **Enrollment Status**.
6. Click **Update**.

Quick Steps – Service Intensity

1. Click **Service Intensity Level** on the *Participant Information* screen.
2. Click **Add New Record**.
3. Enter the **Start Date**, select the **Intensity** and click **Update**.

Quick Steps – Group Roster

1. Click **Group Assigned** on the *Participant Information* screen.
2. Click **Add New Group Membership**.
3. Enter **Start Date** and select the **Group Name**.
4. Click **Update**.
5. When the participant leaves the group, click **Edit** and put a date in the **Remove from Roster On** field.

Quick Steps – Staff Assignment

1. Click **Staff Assigned** on the *Participant Information* screen.
2. Click **Add New Record**.
3. Enter the **Start Date** for the staff assignment.
4. Select the **Staff Name**.
5. Select the **Service Provided**.
6. Click **Update**.

Quick Steps – Update Intake Data

1. Click **Intake Data** on the *Participant Information* screen, enter the information, and click **Save Changes**.
2. To update **Address**, **Marital Status** or **DCFS Ward Status**, click the link, click **Add New Record**, enter the new information, and click **Update** or **Save**.

Quick Steps – Participant Outcome Indicators

1. In the *Home* screen, click **Participants**.
2. Select the correct participant.
3. Click **Details**.
4. Click the **Participant Outcome Indicators** link.
5. To enter data for outcome indicators, click on the appropriate link.

Quick Steps – Birth Plan

1. In the *Outcome Indicators* screen, click the **Birth Plan** link.
2. Click **Add New Record**.
3. Enter the **Plan Date**.
4. Click **Yes** for Birth Plan.
5. Click **Update**.

Quick Steps – Homelessness/Transience

1. From the *Outcome Indicators* screen, click the **Transience/Homelessness** link.
2. Click **Add New Record**.
3. Enter the **Date** and **# Days Homeless In Past 6 Months**.
4. Click **Update**.

Quick Steps - Referral

1. Click **Referrals** on the *Outcome Indicators* screen.
2. To update the result of the referral, click **Edit** next to the referral you would like to modify. Select result and click **Update**.
3. To add a new referral, click **Enter More Referrals** in the *Service Ledger*.
4. In the **New Service** field select **Referral** and click **Enter New Services**.
5. Enter referral data and click **Submit**.

Quick Steps – DCFS Reports

1. Click the **DCFS Reports** link on the *Outcome Indicators* screen.
2. Click **Add New Record**.
3. Enter the **Date of DCFS Report**.
4. Select the suspected victim, who made the report, and the outcome.
5. Click **Update**.

Quick Steps - Education

1. From the *Outcome Indicators* screen, click the **Education** link.
2. Click **Add New Record**.
3. Enter the status **Start Date**.
4. Select the education **Status**.
5. Select the education **Level**.
6. Select the **ESL** status.
7. Click **Update**.

Quick Steps - Employment

1. From the *Outcome Indicators* screen, click the **Employment** link.
2. Click **Add New Record**.
3. Enter the **Start Date**.
4. Select the employment **Status**.
5. Click **Update**.

Quick Steps – Medical Home

1. From the *Outcome Indicators* screen, click the **Medical Home** link.
2. Click **Add New Record**.
3. Enter the **Start Date**.
4. Select the current Medical Home.
5. Click **Update**.

Quick Steps – Birth Control

1. Click **Birth Control** on the *Outcome Indicators* screen.
2. Click **Add New Record**.
3. Enter the **Start Date**.
4. Select **Status**.
5. Click **Update**.

Quick Steps – WIC

1. From the *Outcome Indicators* screen, click the **WIC** link.
2. Click **Add New Record**.
3. Enter the new WIC status **Date**.
4. Select the new WIC **Status**.
5. Click **Update**.

Quick Steps – Prenatal and Child

1. Click the **Prenatal and Child** link on the *Participant Information* screen.
2. Click **Add New Prenatal or Child Record**.
3. Enter **Due Date**, **Name**, and **DOB** and click **Update**.
4. Click **Details** to go to the *Child Data* screen.
5. Click the **Child Intake** link to complete the child intake.

Quick Steps – Child Intake

1. Click **Child Intake** on the *Child Data* screen.
2. Enter **Due Date**, **Trimester Medical Care Began**, **First Name**, **Last Name**, **Weight at Birth**, and **Birth Date**.
3. Select current **Pregnancy Outcome**, **Gender**, **Ethnicity**, and **Delivery Type**.
4. Select option for **Subsequent Birth for Your Program**.
5. Enter **Breastfeeding** status.
6. Enter Doula information if the participant is a Doula participant.
7. Select option for **Medical Insurance**.
8. Leave the bottom fields blank unless you need to remove the child from OunceNet.
9. Click **Submit**.

Quick Steps – Doula Data

1. Click the **Doula Data** link on the *Child Intake* screen.
2. Click either **Yes** or **No** for all Birth Attendance fields.
3. Enter the **Healthcare Provider's Name**.
4. Select whether **Epidural Given**.
5. Select if the **Provider is Known to the Participant**.
6. Select the type of **Medical Insurance**.
7. Click **Submit**.

Quick Steps – Remove a Child from Statistics/DCFS Status

To remove a child from your program's outcome statistics:

1. Enter the **Date** of removal and select an option in the **Remove Child from Statistics Because** field.
2. Click **Submit** to save your data.

To change the child's DCFS status:

1. Click the **Child DCFS Status** link.
2. Click **Add New Record**, enter the **Date** and select **Child Ward of DCFS?** option.
3. Click **Update** to save your new record.

Quick Steps – Edit or Delete a Record

1. Click **Edit** next to the record you wish to modify.
2. Enter revisions.
3. Click **Update** to save your new data.
4. Click **Delete** only to remove all history of a record from OunceNet.

Quick Steps – Father Involvement

1. In the *Child Data* screen, click the **Father Involvement** link.
2. Click **Add New Record**.
3. Enter **Date**.
4. Select level of **Involvement**.
5. Click **Update**.

Quick Steps – Child Medical Home

1. In the *Child Data* screen, click the **Medical Home** link.
2. Click **Add New Record**.
3. Enter **Date**.
4. Select the current Medical Home.
5. Click **Update**.

Quick Steps – Child Care

1. Click the **Child Care** link from the *Child Data* screen.
2. Click **Add New Record**.
3. Enter the **Date**.
4. Select the **Child Care Source**.
5. Enter the **# of Hours of child care Per Week**.
6. Click **Update**.

Quick Steps – Child Feeding

1. Click the **Feeding** link on the *Child Data* screen.
2. Select options from dropdowns appropriate to child's age.
3. Click **Submit**.

Quick Steps – Service Ledger

1. From the *Home* screen, click **Service Ledger**.
2. To find a list of services for a certain date, use the following search options:
 - Enter the **Date** of the services you would like to find if other than the date shown.
 - Select the **Staff Name** whose services you would like to find if other than the name shown.
3. Click the **Search** button.

To enter a new service:

1. From the *Home* Screen, click on the **Service Ledger** link.
2. Select your name from the **Staff Name** list.
3. Select the type of **New Service**.
4. Click **Enter New Services**.

To find entered services:

1. Select a **Staff Name**.
2. Enter the date of service in the **Date** field.
3. Click **Search**.

Quick Steps – Individual Contact

1. Select the **Primary Staff** if the appropriate name does not already appear.
2. Select the **Participant** involved.
3. Enter the **Date of Service** if the correct date does not already appear.
4. Enter the **Start Time, Duration, and Result of the Individual Contact**.
5. Select whether the **Father Participated**.
6. Enter the **Category** and **Result** of the referral if one was offered. (If more than one referral was offered, enter the additional referrals on the *Referral* screen.)
7. Enter the **Topic** discussed.
8. Click **Submit**.

Quick Steps – Doula Home Visit

1. Select **Participant**.
2. Enter the **Date, Start Time, Duration, and Topics**.
3. Select the **Location, Result** and whether the **Father Participated**.
4. Select the **Visit Type** and **CB FANA Type**.
5. Click **Submit**.

Quick Steps – Doula Hospital Service

1. Select **Participant**.
2. Enter the **Date, Start Time** and **Duration**.
3. Select the **Result** and whether the **Father Participated**.
4. Select who **Initiated** the service.
5. Click **Submit**.

Quick Steps – Group Service

1. Select **Group Name**.
2. Enter the **Date, Start Time, and Duration** and group **Topics**.
3. Select **Child Care, Food, Parent Child Activity, and Group Cycle**.
4. Click **Select Participants**, then click **Yes** next to the names of group attendees and click **Save**.
5. Add **Number of Guests**.
6. Click **Submit**.

Quick Steps – Community Education

1. Select **Primary Staff**, **Event Name** and **Program Name**.
2. Enter **Date**, **Start Time**, **Duration** and **Topics**.
3. Select whether **Child Care** was provided and enter **Total Attending** the event.
4. If there were additional staff participating, click **Select Additional Staff**. Click **Yes** next to the names of the **Primary Staff** and other **Staff Involved**.
5. Click **Save**.
6. Click **Submit**.

Quick Steps – Referral

1. Select **Staff Name** and **Participant**.
2. Enter the **Date** and **Start Time**.
3. Select the **Referral Category**, **Agency Referred To**, and **Result**.
4. Click **Submit**.

Quick Steps – Meeting

1. Select **Meeting Type**.
2. Enter the **Date**, **Start Time**, **Duration** and **Topics** discussed.
3. Enter the **Total Attending**.
4. Click **Select Additional Staff**.
5. Click **Yes** in the second column next to the names of **Staff Involved** in the meeting, then click **Save**.
6. Click **Participants Discussed** if any participants were discussed during the meeting.
7. Click **Yes** next to the name of any participants discussed during the meeting, then click **Save**.
8. Click **Submit**.

Quick Steps – Supervision

1. Select the **Staff Name** of the supervisor and **Supervision Type**.
2. Enter the **Date**, **Start Time**, **Duration** and **Topic**.
3. Select the **Supervisee**.
4. Click **Participants Discussed**.
5. Click **Yes** next to the names of any participants discussed, then click **Save**.
6. Click **Submit**.